

Records Center User



Gimmel

Instruction Guide



Electronic Edition



January 2026



This is where upstate information will appear in future versions of this instruction guide.

IMPORTANT NOTE ABOUT THIS EDITION

It is recommended that the instructions in this guide be followed step by step for any process completed in Gimmel for the first time at any point after the publication date of this guide. It is also a good way to review the correct process for the task at hand.

When a link is clicked to go to a bookmark in this electronic edition, the destination page will open with the bookmarked information at the top of the screen. [Links appear with blue underline.](#)

Email notifications will be sent for major updates to the instruction guide. Monitor the Instruction Guide section of Help link in Gimmel for occasional single page updates. Email notifications concerning minor updates to the guide will not be sent. To avoid having to check for updates throughout the month, page updates for this edition will be posted to the Help link in Gimmel between the 1st and the 7th calendar day of any month. Always check the publication date for the guide found in the Help link in Gimmel to confirm the current edition of the guide.

Gimmel Instruction Guide

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Introduction to Gimmel

What is Gimmel?

The modernization of TexLinx into Gimmel was completed in the summer of 2025 as a shared effort between Texas State Library and Archives Commission (TSLAC) and the information software team at Gimmel in Houston, TX. It is a secure records management software package designed to assist State Records Center (SRC) clients with storage, requests, destruction, and imaging. Depending upon Organization assignments and permissions, Gimmel allows the client to:

- View the agency's storage inventory at the SRC and items assigned to agency employees.
- Request items to be picked up from the agency or request items to be delivered from the SRC.
- Create imaging jobs for the SRC's imaging department.
- View the agency's Records Retention Schedule on the Records Series tab.
- Research items for destruction (only the RMO/RML can request destruction).

What are some of the modifications from TexLinx to Gimmel?

- Data Sheet is no longer an option for data entry.
- Action Buttons (formerly Action Menus) are categorized and formatted in a new way.
- Export has new functionality.
- File transfer is restricted, files are created only from the boxes tab.

Pay attention to the timer!

When a client logs in to Gimmel the timer starts at 20 minutes and resets when an Organization or Record Series is selected (during Create or Update), when a user moves from tab to tab, or when a client saves information. The Gimmel software team is aware that sometimes the timer misbehaves and times out clients. This was a problem with the former software and that problem persists with this software. We apologize for that. Working efficiently in the system is suggested to avoid this issue. Be sure to click Logout when finished working in Gimmel. Please see **Supplemental Information: Timer** (Page 191).

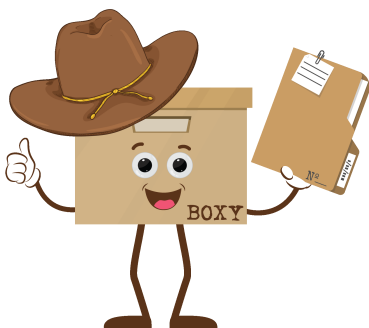
What is this manual?

This is a comprehensive guide designed so that sections stand on their own but may lead to other related sections. Please do not be intimidated by the number of pages. Each section provides step-by-step instructions with illustrations for a specific process. So, please refer to the Table of Contents to find the task to accomplish and go to that section in the guide and follow the instructions. **Contact information** (Page 16) is a great resource when assistance is needed.

The client. Who is the client?

When "the client" is mentioned in this guide, the person accessing Gimmel is the client.

And...what is **BOXYBIT** ?



"Hi, there! My name is Boxy. I'm the State Records Center mascot. When **BOXYBIT** is seen in this guide, it is my way of letting you in on a tidbit (I call it a Boxybit) that I need to add to the instruction. I might be telling expanded details about the current instruction or some advice about what is being done at a specific point in the process."

Need help? Contact list for Gimmal assistance

The Gimmal Instruction Guide is designed to assist clients with the processes needed to work in Gimmal. However, if assistance is needed, these are the people, the phone numbers, and the email addresses for the Texas State Library and Archives Commission employees who can answer Gimmal questions. They work in the State & Local Records Management Division at the Texas State Library and Archives Commission's State Records Center (SRC) on Shoal Creek Boulevard and at the Lorenzo de Zavala (LDZ) Building downtown in the Capitol Complex:

Gimmal Procedure Questions, Gimmal Training, and Password Assistance*:

Bobby French, Customer & System Specialist, SRC, 512-475-5167, gimmal@tsl.texas.gov

*Password resets are not auto-replied. The password reset is sent during regular office hours.

State Records Center (storage, delivery, pick up, destruction, and imaging)

RECORDS CENTER STORAGE:

Zach Bruton, SRC Manager, SRC, 512-475-5151, zbruton@tsl.texas.gov

Delivery / pickup question or rush pick up / rush delivery notification:

SRC Circulation Desk, 512-475-5155, records@tsl.texas.gov

Cancel a delivery request or a pick up request:

SRC Circulation Desk, 512-475-5155, records@tsl.texas.gov

Print new SRC storage labels for boxes, files, and microforms:

SRC Circulation Desk, 512-475-5155, records@tsl.texas.gov

DESTRUCTION:

Zach Bruton, SRC Manager, SRC, 512-475-5151, zbruton@tsl.texas.gov

Donavon Jarmon, Inventory Coordinator, SRC, 512-475-5169, djarmon@tsl.texas.gov

IMAGING (microfilm, microfiche, digital imaging):

Jacqueline Jacobs, Imaging Supervisor, SRC, 512-475-5162, jjacobs@tsl.texas.gov

Records Management Assistance (retention schedules, records management training)

Megan Carey, RMA Manager, LDZ, 512-463-5494, mcarey@tsl.texas.gov

Director, State & Local Records Management Division

Craig Kelso, 512-463-5534 (LDZ), 512-475-5165 (SRC), ckelso@tsl.texas.gov

About the Gimmal Instruction Guide:

Care and attention have been used to make certain the Gimmal Instruction Guide is accurate and complete. If a printing error is found, please send an email to gimmal@tsl.texas.gov

If there is something that should be added in a future edition of the Gimmal Instruction Guide, please send an email to gimmal@tsl.texas.gov

Written, designed, and edited by Bobby French, Customer & System Specialist, January 2026.

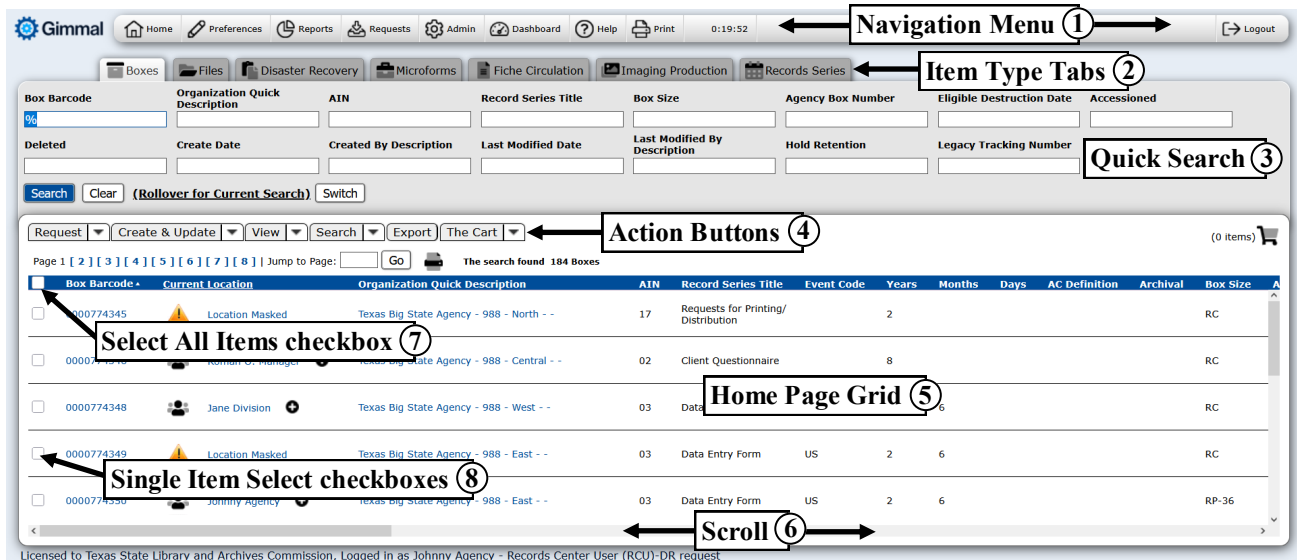
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Gimmel Home Page



This is a sample of how the boxes home page appears for the test client Johnny Agency who is assigned to the role **Records Center User (RCU) - DR request** in Gimmel for the test agency Texas Big State Agency. The formatting on this home page is similar to other Item Type Tabs.

1. **Navigation Menu:** These links are available throughout the application. They can be used to quickly jump to a particular task in Gimmel.
2. **Item Type Tabs:** These are the program tabs available in Gimmel. A gray tab is the active tab. The darker tabs are the inactive tabs.
BOXYBIT Clients assigned to the role of RMO or RML see three additional tabs: Organizations, Individuals, and Disposition Notices.
3. **Quick Search:** These are input search fields and they vary depending upon the Item Type Tab.
4. **Action Buttons:** Tasks to perform for items to appear or are listed in the home page grid.
5. **Home Page Grid:** Information populates here as the result of a search or a query.
6. **Scroll:** Scrolling left or right might be necessary to see all information for an item.
7. **Select All Items Checkbox:** Select the checkbox on the left edge of the column headers ribbon to choose all items on this page for an option in the Action Buttons. This checkbox selects only the items on the current screen page. This checkbox does not select any items on other screen pages. Moving to another page deselects selected boxes. To reset the page for items (up to 500 items) to appear on a single home page grid, please see **Supplemental Information: Preferences: Number of items on home page** (Page 175).
8. **Single Item Select Checkboxes:** Select any checkbox to the left of an item on a home page that will be chosen for an option in the Action Buttons. Checkboxes are selected only for the current page; when moving to another page, checkboxes on the previous page are no longer selected. To reset the page for items (up to 500 items) to appear on a single home page grid, please see **Supplemental Information: Preferences: Number of items on home page** (Page 175).

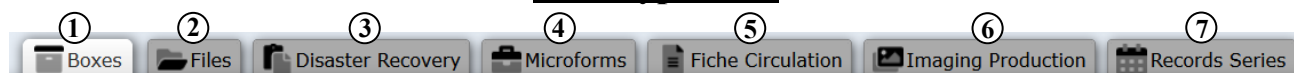
Gimmel Home Page

Navigation Menu



1. **Home:** Always returns to the current Item Type Tab's home page.
2. **Preferences:** Adjust the number of items shown in the home page grid. Please see *Supplemental Information: Preferences: Number of items on home page* (Page 175).
3. **Reports:** Generate specific reports. (Field formatting on reports is not editable.)
4. **Requests:** Review pickup and delivery requests. Clients see only their own requests. Items disappear from the lists when the SRC driver returns to the SRC to process the request.
5. **Admin:** Use this to change the Gimmel password prior to the required 90-day reset. Please see *Supplemental Information: Change Gimmel Password* (Page 187).
6. **Dashboard:** The client sees undeleted assigned items and some requests (use Requests in the Navigation Menu to see all requests), it is not recommended to modify preferences here. Please see *Supplemental Information: Dashboard* (Page 181).
7. **Help:** Reference materials designed to assist clients using Gimmel.
8. **Print:** Prints some of what is seen on the screen.
9. **Timer:** The amount of time left before this session ends. The timer starts at 20 minutes.
BOXYBIT To avoid being accidentally timed out, reset the timer. Please see **Supplemental Information: Timer** (Page 191).
10. **Logout:** Always click Logout when finished, do not close the browser before clicking Logout.

Item Type Tabs



These are the tabs for a Records Center User role. Clients assign to the RMO and RML roles see three additional tabs (Organizations, Individuals, and Disposition Notices). The active tab appears as light gray, the inactive tabs appear as dark gray.

1. **Boxes:** Create, search, view, update, export, and make requests.
2. **Files:** Create, search, view, update, export, and make requests.
3. **Disaster Recovery:** Create, search, view, update, export, and make requests.
4. **Microforms:** This is the combined tab for microfilm and microfiche. Create, search, view, update, export, and make requests.
5. **Fiche Circulation:** Search, view, and request pickup for individual microfiche jackets.
6. **Imaging Production:** Search, create, make requests, and view SRC imaging work orders.
7. **Records Series:** The agency's approved Records Retention Schedule in Gimmel.

Gimmal Home Page

Quick Search

The fields for **Quick Search** vary from tab to tab. The illustration above is for the Boxes tab. Since this area is not static, there could be more or less search fields at any time. Enter search information using letters, numbers, and symbols (please see below) to find items. Please see **Supplemental Information: Search** (Page 169) for more information on how to use search shortcuts.

Search: Click this to see all items on the tab or after completing information for one or more of the Quick Search fields. The Enter/Return key can be used in place of clicking Search.

Clear: Click this to clear the search as well as the results in the home page grid.

(Rollover for Current Search): Hover (do not click) the mouse over this to reveal the search criteria for the items that appear in the home page grid.

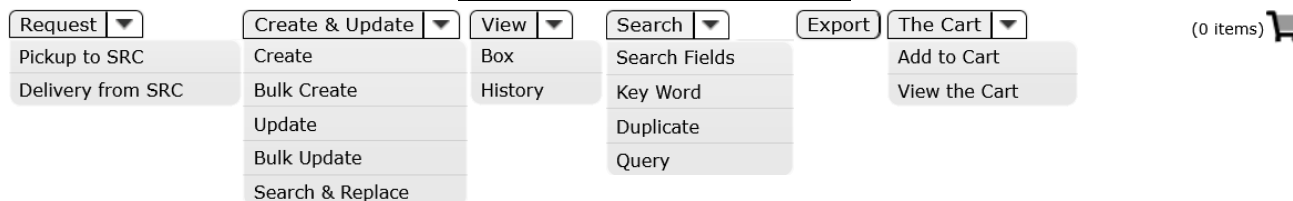
Switch: This pivots between a field specific search and a search term for all fields in the system.

Shortcuts to use in any search fields for a specific tab and for the specified field:

Shortcut	Definition	Data Used	Home Page Result
>	Greater Than	>500	Items greater than 500
<	Less Than	<500	Items less than 500
>=	Greater Than and Equal To	>=500	Items greater than 499
<=	Less Than and Equal To	<=500	Items less than and equal to 501
><	Greater Than and Less Than	>500<700	Items greater than 500 and less than 700
<>	Less Than and Greater Than (Exception)	<500>	Items except for those with 500
IsNotNull	Field with Data	IsNotNull	Items with data in that field
IsNull	Field with No Data	IsNull	Items with no data in that field
Percent sign	Wild Card Key	%	Items with data in that field
spaceORspace	Non-consecutive Search	100 OR 115 OR 125	Items with any 100, 115, or 125 in the field

BOXYBIT Search results are limited to the Organizations the client is assigned in Gimmal.

Action Buttons and Cart



These menus appear in some fashion on all item type tabs (and View screens) and they operate the same across all item type tabs.

REQUEST

Pickup to SRC: To send item(s) from the client to the SRC.

Delivery from SRC: To send item(s) from the SRC to the client.

CREATE & UPDATE

Create: Create an item or a number of items one at a time.

Bulk Create: Create multiple items with identical information that will need to be updated later.

Update: Revise a selected item from the home page grid or the View screen.

Bulk Update: Revise several items selected from the home page grid with the same information.

Search & Replace: Search for a specific term for a specific field and replace that term.

VIEW

Tab (Box, File, etc.) Item: View information for a selected item.

History: View the history for a selected item from the home page grid or the View screen.

SEARCH

Search Fields: Search any data or system field.

Key Word: Use a combination of a specific field and a key word to find items.

Duplicate: Search for duplicate information in a specific field. Query can also be used.

Query: Use equations to generate a search.

EXPORT

Export items from Gimmal to a data editor program/worksheet on the client's computer.

Please see **Supplemental Information: Export** (Page 221).

THE CART

Add To Cart: Move selected items (or an item on a View screen) to the cart for future use (like a request). This is helpful if items in the home page grid appear on multiple pages.

View Cart: View the items moved to the cart for the current tab. When viewing the cart, always click **Clear Cart** to empty the cart when finished working with the items (such as after completing a request for pickup or delivery).

BOXYBIT Click (0 items)  as another way to view items in the cart. The number shown is an accumulated total for the items in the cart for the current tab. The cart is tab specific and client specific; items placed in the cart for one tab do not appear in the cart for another tab and are not in the cart for other Gimmal clients. Other clients at the agency searching for items assigned to the same Organization can still see any items on the home page grid that another client has placed in the cart. The cart should be considered as a temporary holding place of items for the client.

Home Page Grid

Page 1 [2][3][4][5][6][7][8] | Jump to Page: Go The search found 188 Boxes

☐	Box Barcode	Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Def	Archival	Box Size	Agency Box #	Earliest File Date
☐	0000774345	Texas Big State Agency - 988 - North - -	17	Requests for Printing/ Distribution	NONE	2					RC	1	01/01/2020
☐	0000774346	Texas Big State Agency - 988 - Central - -	02	Client Questionnaire	NONE	8					RC	24	01/01/2003
☐	0000774348	Texas Big State Agency - 988 - West - -	27	File Reports and Updates	AC	20	6		AC=Latest file date		RC	45	01/01/2003
☐	0000774349	Texas Big State Agency - 988 - East - -	03	Data Entry Form	US	2	6				RC	a153	01/01/2002

Home page grid column headers in the ribbon vary from tab to tab. There are three parts to the grid:

1. Pages and Printing
2. The Ribbon
3. Search Results

1. Pages and Printing

Page 1 [2][3][4][5][6][7][8] | Jump to Page: Go The search found 188 Boxes

Page 1 [2][3][4][5][6][7][8]: These are the search results pages. The current page appears outside of brackets in black text, additional pages appear in text brackets. This arrangement is due to a setting in Preferences. To see up to 500 items per home page grid, please see **Supplemental Information: Preferences: Number of items on home page** (Page 175).

Jump to Page: Moves to a specific page when the data field is completed and **Go** is clicked once.

Print: Click once on the printer icon to print the search results from all pages.

Search Total: **The search found 188 Boxes** This is how many items appear in the grid.

2. The Ribbon

☐	Box Barcode	Current Location	Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	Agency Number	Earliest Date	Latest Date	Drive Date	Eligible Date	Beginning File	Ending File	Notes	Legacy Tracking Number	Contents
--------------------------	-------------	------------------	--------------------------------	-----	---------------------	------------	-------	--------	------	---------------	----------	----------	---------------	---------------	-------------	------------	---------------	----------------	-------------	-------	------------------------	----------

The column headers in the ribbon vary from tab to tab and horizontal scrolling (left or right) may be needed to see all columns, but the checkbox column and barcode column remain visible to the left when scrolling horizontally. The ribbon here is illustrated to show all column headers for the Boxes tab, it appears in a wider format in the system.

BOXYBIT The Select All checkbox (on the left side of the ribbon) selects only those items on the current home page grid. To select up to 500 items when they appear on multiple home page grids, the items must appear on a single home page grid, please see **Supplemental Information: Preferences: Number of items on home page** (Page 175).

Preferences: Number of items on home page (Page 175).

Sorting by Column Header: To sort, click once on a column header that appears in the column headers ribbon. Clicking the same column header again reverses the order of the column.

BOXYBIT Beware: Sorting is not always functional and is for only one column at a time.

3. Search Results

☐	Box Barcode	Current Location	Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	Agency
☐	0000866660	Location Masked	Texas Big State Agency - 988 - East - -	37	Agency Projections	CE	5					RC	9
☐	0000866659	Johnny Agency	Texas Big State Agency - 988 - East - -	37	Agency Projections	CE	5					RC	8

Checkboxes: Click once on the checkbox on the left edge of the home page grid to select an item or items for pickup, delivery, update, the cart, or other action using the dropdown menus. Moving to a different page deselects any selected checkboxes on any previous page.

Current Location: Information in the column shows where the item is assigned.

- **Location Masked** in Current Location means the item is at to the SRC (or is on the way to the agency). The exact location for an item at the SRC is not disclosed for security reasons.
- **RoMOna Manager** in Current Location means the item is with an agency employee (or it is on the way to the SRC).
- **0001252555 - 1** in Current Location on the Files tab indicates the file is assigned to a box. The numbers after the box icon are the Box Barcode - Agency Box Number.

NOTES

[illegible]

Boxes: Use ‘Create’ to Add Boxes

Create is used to create one box or several boxes, one item at a time.

BOXYBIT There are a couple of ways for a client to create boxes in Gimmal (as illustrated in this guide); this is the preferred method to create any number of boxes.

Create a box

The screenshot shows the Gimmal web application interface. At the top, there is a navigation bar with tabs for Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. Below this is a sub-navigation bar with tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The 'Boxes' tab is selected. The main content area contains a form for creating a box. The form has several input fields: Box Barcode, Organization Quick Description, AIN, Record Series Title, Box Size, Agency Box Number, Eligible Destruction Date, Accessioned, Deleted, Created Date, Created By Description, Last Modified Date, Last Modified By Description, Hold Retention, and Legacy Tracking Number. There are also buttons for Search, Clear, and a rollover search button. Below the form is a table with columns for Request, Create & Update, View, Search, Export, and The Cart. The 'Create & Update' dropdown menu is open, showing options: Create, Bulk Create, Update, Bulk Update, and Search & Replace. The 'Create' option is highlighted. Red arrows and numbers indicate the steps: 1. Click on the 'Boxes' item type tab. 2. Click on 'Create & Update' in the Action Buttons. 3. Click on 'Create' from the dropdown menu.

1. Click once on the **Boxes** item type tab.
2. Click once on **Create & Update** in the Action Buttons.
3. Click once on **Create** from the dropdown menu.

Create Box screen

Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request

Boxes: Use 'Create' to Add Boxes

BOXYBIT All fields with an asterisk (*) are required fields. The page does not process without completing these required fields.

*Organization

*Organization: Texas Big State Agency - 988 - South - - 5

Agency Name **Division Name** **Business Unit Name** **Business Sub-Unit Name** **Deleted** **Organization Quick Description**

Search Here:

Current Search: Find all Organization. 1

Page 1 | Jump to Page: The search found 6 Items

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Deleted	Organization Quick Description
☐ Texas Big State Agency - 988	Central			False	Texas Big State Agency - 988 - Central - -
☐ Texas Big State Agency - 988	East			False	Texas Big State Agency - 988 - East - -
☐ Texas Big State Agency - 988	West			False	Texas Big State Agency - 988 - West - -
☐ Texas Big State Agency - 988	North			False	Texas Big State Agency - 988 - North - -
☐ Texas Big State Agency - 988	South			False	Texas Big State Agency - 988 - South - -
☐ 988 - Gimmel Organization Control				False	988 - Gimmel Organization Control - - -

2

Click once (1) on **Search** to find all Organizations assigned to the account or use the **Quick Search** area (2) to find a specific Organization then click Search. Select the **Organization** associated with this item by clicking once (3) on the radio button at the left side of the screen. Do not select (4) the Gimmel Organization Control. It is here for technical reasons. The selected Organization will populate (5) in the **Organization** field.

BOXYBIT Is the needed Organization missing? Contact the agency's Records Management team.

*Records Series

*Records Series: Texas Big State Agency - 988 - South - - 3

Organization Quick Description **AIN** **RSIN** **Record Series Title** **Event Code** **Years**

Search Here:

Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button. Search

Page 1 [2] [3] [4] [5] [6] | Jump to Page: The search found 54 Items

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Remarks
☐ Texas Big State Agency - 988 - -	38		Transmittals - Original	AC	3			AC=Latest page date	
☐ Texas Big State Agency - 988 - -	02		Client Questionnaire	N/A	8				
☐ Texas Big State Agency - 988 - -	03		Data Entry Form	US	2	6			
☐ Texas Big State Agency - 988 - -	04		Notice of Possible Eligibility	AC	15			AC=Feb. 2 following the latest file	

2

Records Series is a combination of Agency Item Number (AIN) and Record Series Title on the agency's Records Retention Schedule. The item created in Gimmel must have a Records Series assigned to it. Select the Record Series Title by clicking once (1) on the radio button at the left side of the screen. Use the Quick Search fields (2) to find a specific Record Series Title or to narrow the selection of available Record Series Titles. The selection populates (3) in the **Records Series** field.

BOXYBIT Is the needed Record Series missing? Contact the agency's Records Management team.

The Records Series section can be used to reset the timer. Please see **Supplemental Information: Timer** (Page 191).

How these fields look when completed:

*Organization: Texas Big State Agency - 988 - South - -

Agency Name **Division Name** **Business Unit Name** **Business Sub-Unit Name** **Deleted** **Organization Quick Description**

Search Here:

Current Search: Find all Organization. Search

*Records Series: 04 - Notice of Possible Eligibility

Organization Quick Description **AIN** **RSIN** **Record Series Title** **Event Code** **Years**

Search Here:

Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button. Search

Gimmel Instruction Guide - Records Center User, 01/2026

27

Boxes: Use 'Create' to Add Boxes

*Box Size

*Box Size:
RC
RP-36
RP-48

Box Size options are (W=width, L=length, D=depth):

- **RC** — Regular Container (12-1/4"W x 15-3/4"L x 10-1/4"D, two hand-holds, removeable lid)
- **RP-36** — Roll Plan 36" (6"W x 6"L x 36"D, no hand-holds, with end flap closers)
- **RP-48** — Roll Plan 48" (6"W x 6"L x 48"D, no hand-holds, with end flap closers)

*Earliest File Date

*Earliest File Date: 

The **Earliest File Date** is the date information for the earliest date for all items in the box. The date information is entered in this format with forward slashes and no spaces:

MM/DD/YYYY

Optional step: Click the calendar icon  to select the date from the calendar.

Data Example: 01/01/2024

*Latest File Date

*Latest File Date: 

The **Latest File Date** is the date information for the latest date for all items in the box. The date information is entered in this format with forward slashes and no spaces:

MM/DD/YYYY

Optional step: Click the calendar icon  to select the date from the calendar.

Data Example: 12/31/2024

BOXYBIT If the Earliest File Date and the Latest File Date are the same, enter the same date into both fields.

*Drive Date

*Drive Date: 

Enter a date MM/DD/YYYY or click the calendar icon to select a Drive Date. Gimmal uses Drive Date in conjunction with retention (Event Code, Years, Months, Days) to calculate an Eligible Destruction Date. Drive Date is not Eligible Destruction Date unless there is no data in all three fields for Years, Months, Days.

BOXYBIT Please see **Supplemental Information: Drive Date** (Page 179).

Data Example: 02/02/2025

How these fields look when completed:

*Box Size: 
*Earliest File Date: 
*Latest File Date: 
*Drive Date: 

Boxes: Use 'Create' to Add Boxes

*Agency Box Number

*Agency Box Number:

Agency Box Number is the container identification number the client assigns to this item. The Agency Box Number can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the number. The Pipe symbol is used as a delimiter when exporting information. Do not use duplicate box numbers in the same shipment.

BOXYBIT This number is written on the box. To learn more about that process, please see [Preparing Records for Storage at the State Records Center in the Help link.](#)

Data Example: H-146

*Beginning File

*Beginning File:

The **Beginning File** is composed of the first item in the box. The information on the file tab represents what is entered in this field. The only restriction: Do not use a Pipe symbol | as part of the file name. The Pipe symbol is used as a delimiter when exporting information. Do not press the Enter/Return key on the keyboard.

Data Example: Adams, Michael

*Ending File

*Ending File:

The **Ending File** is composed of the last item in the box. The information on the file tab represents what is entered in this field. If the beginning file and ending file names are identical, repeat the entry from Beginning File field. The only restriction: Do not use a Pipe symbol | as part of the file name. The Pipe symbol is used as a delimiter when exporting information. Do not press the Enter/Return key on the keyboard.

Data Example: Ybarra, Julio

Notes

Notes:

Notes is an optional field for additional information about this box. Any character can be used except for the Pipe symbol. Do not press the Enter/Return key on the keyboard.

Data Example: Files are alphabetical by client last name. File documents arranged by date.

Disregard these fields

Legacy Tracking #:

Legacy Notes:

Accessioned: ☐

Legacy Tracking #, Legacy Notes, and Accessioned are fields that cannot be data entered. The software does not allow them to be hidden during this process.

How these fields look when completed:

*Agency Box #: H-146

*Beginning File: Adams, Michael

*Ending File: Ybarra, Julio

Notes: Files are alphabetical by client last name. File documents arranged by date.

Boxes: Use 'Create' to Add Boxes

Legal Holds

The **Legal Holds** section is provided to place items on hold to keep them from being eligible for destruction. *Please see **Supplemental Information: Hold** (Page 197). This is usually done as an update at a later time.*

Legal Holds:

[Add](#) [Select All](#) [Remove All](#) Legal Holds selected: 0

Selected Legal Holds

Page 1 | Jump to Page: [Go](#)

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
-------------------	-----------	-----------	-------------	-----------	--------------------------	------------------------

 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual

[Search](#) [Clear](#) [\(Rollover for Current Search\)](#) [Switch](#)

Page 1 | Jump to Page: [Go](#) The search found 0 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
-----------	-----------	-------------	-----------	--------------------------	------------------------

Boxes: Use 'Create' to Add Boxes

Completed: Create Box screen:

Home
Preferences
Reports
Requests
Admin
Dashboard
Help
Print
0:15:11
Logout

Create Box

Cancel
Set Defaults
Save & Close
Save & View
Save & New

Fields marked with an * are required.

*Organization: Texas Big State Agency - 988 - South - -

Agency Name
Division Name
Business Unit Name
Business Sub-Unit Name
Deleted
Organization Quick Description

Search Here:

Current Search: Find all Organization.

Page 1 | Jump to Page:
Go
The search found 6 Items

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Deleted	Organization Quick Description
☐ Texas Big State Agency - 988	Central			False	Texas Big State Agency - 988 - Central - -
☐ Texas Big State Agency - 988	East			False	Texas Big State Agency - 988 - East - -
☐ Texas Big State Agency - 988	West			False	Texas Big State Agency - 988 - West - -
☐ Texas Big State Agency - 988	North			False	Texas Big State Agency - 988 - North - -
☒ Texas Big State Agency - 988	South			False	Texas Big State Agency - 988 - South - -
☐ 988 - Gimmel Organization Control				False	988 - Gimmel Organization Control - -

*Records Series: 04 - Notice of Possible Eligibility

Organization Quick Description
AIN
RSIN
Record Series Title
Event Code
Years

Search Here:

Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button.

Page 1 | [2] [3] [4] [5] [6] | Jump to Page:
Go
The search found 54 Items

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Remarks
☐ Texas Big State Agency - 988 - -	38		Transmittals - Original	AC	3			AC=Latest page date	
☐ Texas Big State Agency - 988 - -	02		Client Questionnaire	N/A	8				
☐ Texas Big State Agency - 988 - -	03		Data Entry Form	US	2	6			
☒ Texas Big State Agency - 988 - -	04		Notice of Possible Eligibility	AC	15			AC=Feb. 2 following the latest file date	
☐ Texas Big State Agency - 988 - -	05		Eligible Cases	AC	2	6		AC=End of latest case	
☐ Texas Big State Agency - 988 - -	06		Employee Earnings Records	AC	10			AC=Latest end of employment date	
☐ Texas Big State Agency - 988 - -	07		Employee Savings Bonds	CE	50				Send annually to the State Records Center.
☐ Texas Big State Agency - 988 - -	08		Employee Deduction Authorizations	FE	50				
☐ Texas Big State Agency - 988 - -	09		External Reports	AC	3	6		AC=Latest report date	
☐ Texas Big State Agency - 988 - -	10		Internal Fiscal Management Reports	AC	10			AC=Latest report date	

*Box Size: RC

*Earliest File Date: 01/01/2024

*Latest File Date: 12/31/2024

*Drive Date: 02/02/2025

*Agency Box Number: H-146

*Beginning File: Adams, Michael

*Ending File: Ybarra, Julio

Notes: Files are alphabetical by client last name. File documents arranged by date.

Accessioned: ☐

Legacy Tracking Number:

Legacy Notes:

Legal Holds:

Select All
Remove All
Legal Holds selected: 0
Selected Legal Holds

Page 1 | Jump to Page:
Go

Quick Description
Hold Code
Hold Name
Hold Status
Hold Type
Authorized By Individual
Released By Individual

Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual

Search
Clear
(Rollover for Current Search)
Switch

Page 1 | Jump to Page:
Go
The search found 0 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
-----------	-----------	-------------	-----------	--------------------------	------------------------

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Boxes: Use 'Create' to Add Boxes

Save Options

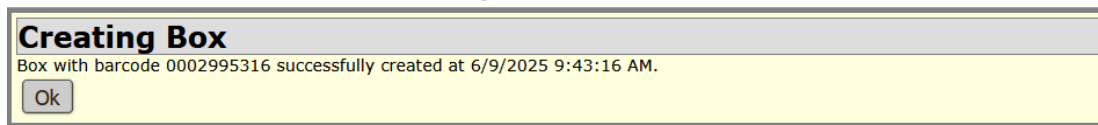


When the data fields are complete, the next step is to **Save** the information.

These options are located at the Create Box screen's top right:

- **Cancel:** Click once to cancel the create process for this item. It will not be saved.
- **Set Defaults:** Do not click Set Defaults. Selecting this can compromise the Create process.
- **Save & Close:** Click once if:
 - selecting Save & New has been used for a set of items and the final item has been data entered.
- **OR**
 - Request Pickup is not going to be completed at this time. Search will need to be completed later to find the unrequested item to complete Request Pickup.
- **Save & View:** Click once if only one item is to be created and Request Pickup is ready to be completed.
- **Save & New:** Click once to create another item. For convenience, some fields will carry forward to eliminate repeated data entry. Fields carried forward are still editable. See **Save & Close** after data entering the final item.

Creating Box information



The create progress bar will display; if the above information does not appear, an error message appears at the top of the screen. Correct the error and click the original save option.

When the above information appears, it includes the Box Barcode that was generated for this box. The barcode is the unique identification number applied to each item created. Click once on **Ok**.

Then, if selected:

- **Save & Close:** The box is saved and the Boxes home page appears. Turn to ***Request Pickup: Send/Return Items to the SRC*** (Page 93) to have the box picked up.
- **Save & View:** The box is saved. Review information on the View Box screen for the box just created. To request the box to be picked up and sent to the SRC, turn to ***Request Pickup: Send/Return Items to the SRC*** (Page 93).
- **Save & New:** The box is saved. Another Create Box screen appears. Several fields are carried forward from the previous box created but all fields are editable.

Boxes: Use 'Create' to Add Boxes

NOTES

[illegible]

Boxes: Use 'Create' to Add Boxes

NOTES

[illegible]

Boxes: Use ‘Bulk Create’ to Add Boxes

Bulk Create is used to create several boxes all at once.

BOXYBIT *The boxes are created for the same Organization and the same Record Series. The data entry for the first box applies to all of the boxes; the data fields for each box can be modified later.*

Bulk Create boxes

The screenshot shows the Gimmel Records Center interface. At the top, there's a navigation bar with tabs: Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. Below this, there's a sub-navigation bar with tabs: Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The 'Boxes' tab is selected. The main area contains a form for creating boxes with fields for Box Barcode, Organization Quick Description, AIN, Record Series Title, Box Size, Agency Box #, Eligible Destruction Date, and Accessioned. Below the form, there's a 'Create & Update' button. A dropdown menu is open, showing options: Create, Bulk Create, Update, Bulk Update, and Search & Replace. The 'Bulk Create' option is highlighted. A table below the dropdown shows the search results for 'Boxes'.

Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	Agency Box #	Earliest File Date	Latest File Date	Drive
The search found 0 Boxes													

1. Click once on the **Boxes** item type tab.
2. Click once on **Create & Update** in the Action Buttons.
3. Click once on **Bulk Create** from the dropdown menu.

Boxes: Use 'Bulk Create' to Add Boxes

Bulk Create New Boxes screen

Fields marked with an * are required.
Number of items to create:

***Organization:**

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Quick Description
Search Here:				

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

***Records Series:**

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years
Search Here:					
Months	Days	AC Definition	Remarks		

Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button.

*Box Size:

*Earliest File Date:

*Latest File Date:

*Drive Date:

*Agency Box Number:

*Beginning File:

*Ending File:

Notes:

Accessioned: ☐

Legacy Tracking Number:

Legacy Notes:

Legal Holds:

Select All Remove All Legal Holds selected: 0 Selected Legal Holds

Page 1 | Jump to Page: Go

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
Legal Holds						
Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	

(Rollover for Current Search)

Page 1 | Jump to Page: Go The search found 0 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
-----------	-----------	-------------	-----------	--------------------------	------------------------

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Number of items to create

Number of items to create:

Enter the number of boxes to be created.

BOXYBIT At this point, continue the data entry by turning back to **Boxes: Use 'Create' to Add Boxes** (Page 27) to complete Organization and the other data fields in the section. When data entry is complete, resume on Page 37 to review, then, save the information.

Boxes: Use 'Bulk Create' to Add Boxes

Completed: Bulk Create New Boxes screen:

[Home](#)
[Preferences](#)
[Reports](#)
[Requests](#)
[Admin](#)
[Dashboard](#)
[Help](#)
[Print](#)
0:18:43
[Logout](#)

Bulk Create New Boxes
Cancel
Create Items

Fields marked with an * are required.
Number of items to create:

*Organization: **Texas Big State Agency - 988 - West - -**

Agency Name
Division Name
Business Unit Name
Business Sub-Unit Name
Deleted
Organization Quick Description

Search Here:

Current Search: Find all Organization.
Search
Clear

Page 1 | Jump to Page: Go The search found 6 Items

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Deleted	Organization Quick Description
☐ Texas Big State Agency - 988	Central			False	Texas Big State Agency - 988 - Central - -
☐ Texas Big State Agency - 988	East			False	Texas Big State Agency - 988 - East - -
☒ Texas Big State Agency - 988	West			False	Texas Big State Agency - 988 - West - -
☐ Texas Big State Agency - 988	North			False	Texas Big State Agency - 988 - North - -
☐ Texas Big State Agency - 988	South			False	Texas Big State Agency - 988 - South - -
☐ 988 - Gimmel Organization Control				False	988 - Gimmel Organization Control - -

*Records Series: **02 - Client Questionnaire**

Organization Quick Description
AIN
RSIN
Record Series Title
Event Code
Years

Search Here:

Months Days AC Definition Remarks

Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button.
Search
Clear

Page 1 | [2] [3] [4] [5] [6] | Jump to Page: Go The search found 54 Items

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Remarks
☐ Texas Big State Agency - 988 - -	38		Transmittals - Original	AC	3			AC=Latest page date	
☒ Texas Big State Agency - 988 - -	02		Client Questionnaire	N/A	8				
☐ Texas Big State Agency - 988 - -	03		Data Entry Form	US	2	6			
☐ Texas Big State Agency - 988 - -	04		Notice of Possible Eligibility	AC	15			AC=Feb. 2 following the latest file date	
☐ Texas Big State Agency - 988 - -	05		Eligible Cases	AC	2	6		AC=End of latest case	
☐ Texas Big State Agency - 988 - -	06		Employee Earnings Records	AC	10			AC=Latest end of employment date	
☐ Texas Big State Agency - 988 - -	07		Employee Savings Bonds	CE	50				Send annually to the State Records Center.
☐ Texas Big State Agency - 988 - -	08		Employee Deduction Authorizations	FE	50				
☐ Texas Big State Agency - 988 - -	09		External Reports	AC	3	6		AC=Latest report date	
☐ Texas Big State Agency - 988 - -	10		Internal Fiscal Management Reports	AC	10			AC=Latest report date	

*Box Size: **RC**

*Earliest File Date:

*Latest File Date:

*Drive Date:

*Agency Box Number:

*Beginning File:

*Ending File:

Notes:

Accessioned: ☐

Legacy Tracking Number:

Legacy Notes:

Legal Holds: Select All Remove All Legal Holds selected: 0

Page 1 | Jump to Page: Go

Quick Description Hold Code Hold Name Hold Status Hold Type Authorized By Individual Released By Individual

Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual

Search
Clear
(Rollover for Current Search)
Switch

Page 1 | Jump to Page: Go The search found 0 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
-----------	-----------	-------------	-----------	--------------------------	------------------------

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Boxes: Use 'Bulk Create' to Add Boxes

Save

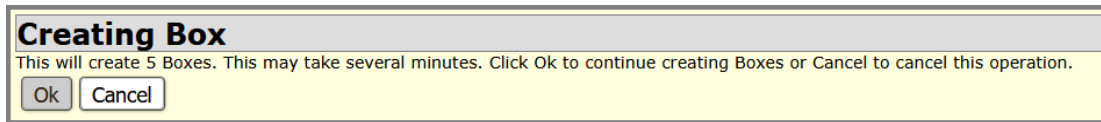


When data entry is complete, the next step is to **Save** the information.

The save option is located at the Bulk Create New Boxes screen's top right:

- **Cancel:** Click once to cancel the create process for these items. They will not be saved.
- **Create Items:** Click once to create the boxes.

Creating Box information



If the above message does not appear telling how many boxes are to be created, an error message appears at the top of the screen. Correct the error and click the save option, again. Click once on **Ok**.

BOXYBIT *Do not click Ok more than once or Gimmel will duplicate the number of boxes being created. If duplicate boxes are created, send an email to gimmel@tsl.texas.gov and include a list of the box barcodes to be deleted. Do not send a screengrab image.*



The create progress bar will display. When the above message appears, Click once on **Ok**. Then, turn to ***Request Pickup: Send/Return Items to the SRC*** (Page 93) to have the boxes picked up by the SRC.

Boxes: Use 'Bulk Create' to Add Boxes

NOTES

[illegible]

Boxes: Use 'Bulk Create' to Add Boxes

NOTES

[illegible]

Boxes: Do Not Use Records Series Tab to Add Boxes

View Records Series

View Records Series 29 - Files Supporting Agency Processes

View Search Export The Cart

Record Series Title: Files Supporting Agency Processes

Description:

Event Code: N/A

Years: 15

Months:

Days:

AC Definition:

Archival:

Remarks:

Legal Citations:

Vital: ☐

Confidentiality: Confidential

Approval Status: Approved

Item Approval Date:

Schedule Approval Date: 10/10/2023

Storage: ☐

Permanent: ☐

Notes:

Records Series (Boxes): 3 Boxes [Query Boxes on Home Page](#) [Create a New Box for this Records Series](#)

Page 1 | Jump to Page: Go

Box Quick Description	Current Location
0000992079 - 27	Location Masked
0000992080 - 28	Location Masked
0000992081 - 29	Location Masked

The functionality for creating items on from the Records Series tab does not work. Please do not use this method to create items.

Boxes: Do Not Use Records Series Tab to Add Boxes

NOTES

[illegible]

Files: Create

When **Create & Update** is clicked on the Files tab, the dropdown menu shows the **Create (Use Boxes tab to create files)** because the process is streamlined to use the Boxes tab to create files. There is no instruction in this guide if Create is chosen on the Files tab because **Transfer** is needed to assign to a box any files created on the Files tab. Transfer is a restricted option in Gimmal.

Two requirements:

- ◆ The box must be at the agency (employee named in the box's Current Location field.)
- ◆ The file must be for the same Record Series assigned to the box.

BOXYBIT The SRC does not require the client to create file information in Gimmal.

Two reasons to create files in Gimmal:

- This creates an electronic inventory of agency files in Gimmal.
- The request process for files is less complicated.

Use 'Create' from the Contents column on the Boxes tab

Find the box

Search for the box to create the file(s):

1. Click once on the **Boxes** item type tab.
2. Enter search information into the **Quick Search** fields.
3. Click once on **Search**. Continue to **Review information for the box** (Page 45) if information shows in the home page grid.

OR

4. Click once on **Search** dropdown menu.
5. Click once on **Search Fields** and continue on Page 44.

BOXYBIT Please see **Supplemental Information: Search** (Page 169) for tips on how to Search.

Search Boxes screen

Search for Boxes

Cancel Execute

Organization:

Agency Name Division Name Business Unit Name Business Sub-Unit Name Deleted Organization Quick Description

Search Here: [] [] [] [] [] []

Current Search: [] [] [] [] [] [] Search Clear

Organization : []

Agency Name: []

Division Name: []

Business Unit Name: []

Sub Business Unit Name: []

TSLAC Analyst: []

Records Series:

Organization Quick Description AIN RSIN Record Series Title Event Code Years

Search Here: [] [] [] [] [] []

Months Days AC Definition Remarks

Current Search: [] [] [] [] [] [] Search Clear

Records Series: []

RSIN: []

AIN: []

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Complete any fields (even those in **Gimmel System Fields**) to find the box. Once the Search information is complete, click once on **Execute**.

Review information for the box

Box Barcode: 000774351<=0000774360

Organization Quick Description: [Empty]

AIN: [Empty]

Record Series Title: [Empty]

Box Size: [Empty]

Agency Box Number: [Empty]

Eligible Destruction Date: [Empty]

Accessioned: [Empty]

Deleted: [Empty]

Create Date: [Empty]

Created By Description: [Empty]

Last Modified Date: [Empty]

Last Modified By Description: [Empty]

Hold Retention: [Empty]

Legacy Tracking Number: [Empty]

Search [Clear] (Rollover for Current Search) [Switch]

Request [Create & Update] [View] [Search] [Export] [The Cart] (0 items)

Page 1 | Jump to page: [Empty] Go [Empty] The search found 4 Boxes

Box Barcode	Current Location	Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	Agent
0000774351	Location Masked	Texas Big State Agency - 988 - East - -	03	Data Entry Form	US	2	6				RC	10
0000774352	Location Masked	Texas Big State Agency - 988 - East - -	03	Data Entry Form	US	2	6				RC	77
0000774355	Johnny Agency	Texas Big State Agency - 988 - North - -	03	Data Entry Form	US	2	6				RC	89a2:
0000774360	Johnny Agency	Texas Big State Agency - 988 - West - -	03	Data Entry Form	US	2	6				RC	24

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A box with **Location Masked** in the **Current Location** field (1) is assigned to the SRC. Do not create files for a box assigned to the SRC. To create a file for a box that is assigned to the SRC, request the box to be delivered. Once the client's name appears in the box's **Current Location**, files can then be created for the box. If the box is assigned to the SRC, turn to **Request Delivery from the SRC: Boxes, Disaster Recovery, Microfilm Reels, and Microfiche Bundles** (Page 107) to complete a delivery request for the box and wait for its Current Location to be updated to the client.

Review the following data fields for the box:

- **Organization:** Make sure the Organization for the box is the same as the file. They must be the same. Consult a coworker if assistance is needed.
- **Record Series Title:** Even though the Record Series Title does not appear on the Create File screen, the file must be for the same Records Series Title assigned to the box. Consult a coworker if assistance is needed.
- **Earliest File Date** and **Latest File Date:** The date information for the file must fall within this date range. If the date information for the file is outside of this range, the box information will need to be updated.
- **Beginning File Name** and **Ending File Name:** The file name must fall within this file names range. If the file name is outside of this range, the box information will need to be updated.

If the date or file name fields for the box need to be updated, please see **Supplemental Information: Update / Bulk Update** (Page 211). If the box already has a State Records Center box barcode label, when the box is requested for pickup, use the **Comments** field to let the SRC know a new box label needs to be printed for the box due to field updates.

In this example, Box Barcode 0000774355 is the box that needs to have a file added to it. The box is assigned to an employee at the agency, it is eligible to have a file added to it in Gimmal. Click and hold the scroll bar at the bottom of the screen (2) to move to **Contents**, the last column on the right.

Files: Create

The box Contents column

The screenshot shows the Gimmal interface with a search bar and a table of boxes. The table has columns for 'Box Barcode', 'Legacy Tracking Number', and 'Contents'. Red arrows and numbers 1 through 6 highlight specific elements: 1 points to the 'Contents' column header, 2 points to the box barcode '0000774355', 3 points to the 'Contents' column for box 0000774355, 4 points to the box barcode '0000774360', 5 points to the 'Contents' column for box 0000774360, and 6 points to the 'Show' link for box 0000774360.

0000774355 - 89a21 contents:

0 Files [Create](#)

The **Contents** column (1) has file information for the box. Box barcode 0000774355 (2) is going to be the box where a file needs to be created. The Contents column (3) shows it currently has no files in Gimmal.

0000774360 - 24 contents:

9 Files [Show Create](#) [Run Contents Report](#) [Query Files with this Box](#) [Query all Files with 0000774360 - 24 as home location](#)

Sometimes, though, there will be files in Gimmal for a box. Look at Box Barcode 0000774360 (4). The Contents column (5) shows it has nine files in Gimmal. To avoid duplicating a file name in a box, click once (6) on **Show** to see an inventory for the file names assigned to this box.

Files: Create

If Files Exist: Use Show to view file information, use Create to add new file

The screenshot shows the Gimmal interface with a search results page for box 0000774360. The 'Contents' column shows a list of files. A red arrow (1) points to the 'Content' column header. A red arrow (2) points to the 'Page 1 [2]' link. A red arrow (3) points to the 'Create' button in the 'Files' column.

When **Show** is clicked, an inventory popup window displays. The Content column (1) in the popup has the Agency File Name followed by the File Barcode and the number of pages (2). Confirm the File Name is not listed. To add a new file to this box, click once (3) on **Create**.

If files do not exist: Use Create to add the first file to the box in Gimmal

The screenshot shows the Gimmal interface with a search results page for box 0000774355. The 'Contents' column shows a list of files. A red arrow points to the 'Create' button in the 'Files' column.

To add a file to this box that has no files in Gimmal, click once on **Create**.

Create File screen

The screenshot shows the Gimmal 'Create File' screen. The screen displays fields for Organization, Agency File Name, Agency Sub File Name, and File Notes. A red arrow points to the 'Create' button.

Files: Create

*Organization

*Organization: Texas Big State Agency - 988 - North - -

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Deleted	Organization Quick Description
Search Here:					
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.					
					Search Clear

Organization populates based upon the Organization assignment for the box. Do not edit this field. **BOXYBIT** The field for Record Series does not appear for Files but keep in mind the contents for the file must be for the same Record Series as the box. To determine this, please contact the agency's Records Management team.

*Agency File Name

*Agency File Name:

Agency File Name is the name assigned to the file; it appears on the file's tab. Make sure the data entry matches the information on the file tab. Any character can be used except for the Pipe symbol (as explained in the Create Boxes sections). Do not press the Enter/Return key on the keyboard.

Data Example: Holgeweis

Agency Sub File Name

Agency Sub File Name:

Agency Sub File Name is an optional field for additional file name information. Any character can be used except for the Pipe symbol. Do not press the Enter/Return key on the keyboard.

Data Example: Data File

File Notes

File Notes:

File Notes is an optional field for additional information about this file. Any character can be used except for the Pipe symbol. Do not press the Enter/Return key on the keyboard.

Data Example: First half of CE2025

Completed: Create File screen

The newly created File will be located in the 0000774356 - 45 Box
Fields marked with an * are required.

*Organization: Texas Big State Agency - 988 - South - -

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Quick Description
Search Here:				
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.				
				Search Clear

*Agency File Name: Holgeweis

Agency Sub File Name: Employee Incentives

File Notes: First half of May 2025

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Files: Create

Save Options

Cancel	Set Defaults	Save & Close	Save & View	Save & New
--------	--------------	--------------	-------------	------------

When the fields are complete, the next step is to **Save** the information.

These options are located at the Create File screen's top right:

- **Cancel:** Click once to cancel the create process for this item. It will not be saved.
- **Set Defaults:** Do not click Set Defaults. Selecting this can compromise the Create process.
- **Save & Close:** Click once if:
 - information for one file is complete and it is the only file needed to add to this box**OR**
 - Save & New was selected and this is the last file to add to this box.
- **Save & View:** Click once to save and to view the file information.
- **Save & New:** Click once to create another file for this box. See **Save & Close** after data entering the final item.

Creating File information

Creating File
File with barcode 0002995576 successfully created at 7/8/2025 10:50:38 AM.

If the above dialogue box does not appear, an error message appears at the top of the screen. Correct the error and click the save option originally selected.

The create progress bar will display. When the above screen appears, it includes the File Barcode that was generated for this file. The barcode is the unique identification number applied to each item created in Gimmal. Click once on **Ok**. Then, if selected:

- **Save & Close:** The file has been saved and assigned to the box in Gimmal.
- **Save & View:** View File is the screen to review the file just created and to see the box information where the file is assigned in Gimmal (as illustrated below).
- **Save & New:** The file is saved and assigned to the box. Another Create File screen appears for the same box. The Organization field carries forward from the previous file created.

Organization Information:	Texas Big State Agency - 988 - South - -
Organization Quick Description:	Texas Big State Agency - 988 - South - -
Agency Name:	Texas Big State Agency - 988
Division Name:	South
Business Unit Name:	
Sub Business Unit Name:	
Agency File Name:	Holgeweis
Agency Sub File Name:	Employee Incentives
File Notes:	First half of May 2025
Locked Down:	No
Current Location:	0000774356 - 45 
Home Location:	0000774356 - 45
Hub Location:	0000085998

NOTES

[illegible]

Disaster Recovery: Use 'Create' to Add Boxes

Any agency employee requesting pickup or delivery for Disaster Recovery items or in-person access to items in the Disaster Recovery vault must be listed on the RMD 113 Disaster Recovery Service Approval Form on file at the SRC. Those are the only employees who see the Request options in Gimmal. Contact the agency's Records Management team to get added to the RMD 113 form to have permission to request Disaster Recovery items.

The Disaster Recovery Vault at the SRC is available to all state agencies as an off-site storage location for disaster recovery items and items associated with an agency's Continuity of Operations Plan (COOP) or Business Continuity Plan as stated in Texas Labor Code §412.054.

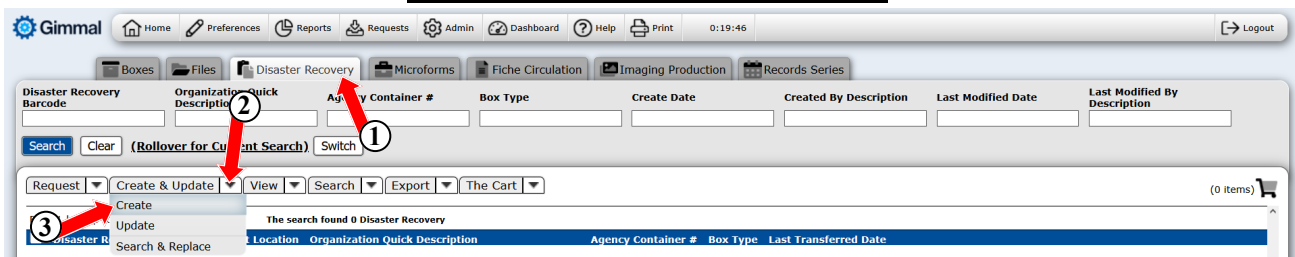
Create is used to create one disaster recovery box or several disaster recovery boxes, one item at a time.

Disaster Recovery Vault After-Hours Access

In the event of emergency after-hours access to Disaster Recovery storage, please refer to the **Disaster Recovery After-Hours Access Information** document found on this webpage:

<https://www.tsl.texas.gov/slr/storage>

Create a disaster recovery box



1. Click once on the **Disaster Recovery** item type tab.
2. Click once on **Create & Update** in the Action Buttons.
3. Click once on **Create** from the dropdown menu.

Create Disaster Recovery screen

A screenshot of the 'Create Disaster Recovery' screen in the Gimmal web application. The form is titled 'Create Disaster Recovery' and has buttons for 'Cancel', 'Set Defaults', 'Save & Close', 'Save & View', and 'Save & New'. Below the title bar, there is a message: 'Fields marked with an * are required.' The form contains several sections: 1. Organization: A search bar with the text 'Search Here:' followed by input fields for 'Agency Name', 'Division Name', 'Business Unit Name', 'Business Sub-Unit Name', and 'Organization Quick Description'. Below these is a 'Current Search:' message and a 'Search' button. 2. Agency Container #: An input field. 3. Box Type: A dropdown menu. 4. Notes: A large text area for notes. At the bottom of the screen, there is a small text line: 'Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User-DR request'.

BOXYBIT All fields with an asterisk (*) are required fields. The page cannot process without completing these required fields.

Disaster Recovery: Use 'Create' to Add Boxes

*Organization

*Organization: 5

Search Here:

Current Search: Find all Organization.

Organization Quick Description:

1 Search Clear

Page 1 | Jump to Page: Go The search found 6 Items

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Deleted	Organization Quick Description
☐ Texas Big State Agency - 988	Central			False	Texas Big State Agency - 988 - Central - -
☐ Texas Big State Agency - 988	East			False	Texas Big State Agency - 988 - East - -
☐ Texas Big State Agency - 988	West			False	Texas Big State Agency - 988 - West - -
☐ Texas Big State Agency - 988	North			False	Texas Big State Agency - 988 - North - -
☐ Texas Big State Agency - 988	South			False	Texas Big State Agency - 988 - South - -
☐ 988 - Gimmel Organization Control				False	988 - Gimmel Organization Control - -

Click once **(1)** on **Search** to find all Organizations assigned to the account or use the **Quick Search** area **(2)** to find a specific Organization then click Search. Select the **Organization** associated with this item by clicking once **(3)** on the radio button at the left side of the screen. Do not select **(4)** the **Gimmel Organization Control**. It is here for technical reasons. The selected Organization will populate **(5)** in the **Organization** field.

BOXYBIT *Is the needed Organization missing? Contact the agency's Records Management team.*

Agency Container Number

Agency Container Number:

Agency Container Number is the identification number determined by the client for this box. This is an optional field for a Disaster Recovery box. The Agency Container Number can be numbers, letters, symbols, or any combination. The only restriction: Do not use a Pipe symbol | as part of the Agency Container Number (as explained in the Create Boxes sections).

Data Example: 2LL4

*Box Type

*Box Type:

v

RC

RC-02

RC-03

RC-04

RC-05

RC-10

Box Type is the size of the Disaster Recovery box to be sent to the SRC Disaster Recovery vault.

- RC: regular-sized Records Center box (12-1/4"W x 15-3/4"L x 10-1/4"D)
- RC-02: larger than the size of one RC box up to the size of two Records Center boxes.
- RC-03: larger than the size of two RC boxes up to the size of three Records Center boxes.
- RC-04: larger than the size of three RC boxes up to the size of four Records Center boxes.
- RC-05: larger than the size of four RC boxes up to the size of five Records Center boxes.
- RC-10: larger than the size of five RC boxes up to the size of 10 RC boxes.

BOXYBIT *The SRC employee will confirm Box Type and make a correction, if needed.*

Disaster Recovery: Use 'Create' to Add Boxes

Notes

Notes:

Notes is an optional field for additional information about this box. Any character can be used except for the Pipe symbol. Do not press the Enter/Return key on the keyboard.

Data Example: Tapes are confidential.

Disaster Recovery: Use 'Create' to Add Boxes

Completed: Create Disaster Recovery screen:

Home Preferences Reports Requests Admin Dashboard Help Print 0:19:10 Logout

Create Disaster Recovery

CancelSet DefaultsSave & CloseSave & ViewSave & New

Fields marked with an * are required.

*Organization: Texas Big State Agency - 988 - South - -

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Deleted	Organization Quick Description
Search Here:					
Current Search: Find all Organization. Search Clear					
Page 1 Jump to Page: Go The search found 6 Items					
☐	Texas Big State Agency - 988	Central		False	Texas Big State Agency - 988 - Central - -
☐	Texas Big State Agency - 988	East		False	Texas Big State Agency - 988 - East - -
☐	Texas Big State Agency - 988	West		False	Texas Big State Agency - 988 - West - -
☐	Texas Big State Agency - 988	North		False	Texas Big State Agency - 988 - North - -
☒	Texas Big State Agency - 988	South		False	Texas Big State Agency - 988 - South - -
☐	988 - Gimmel Organization Control				

Agency Container Number:

*Box Type:

Notes:

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Disaster Recovery: Use 'Create' to Add Boxes

Save Options

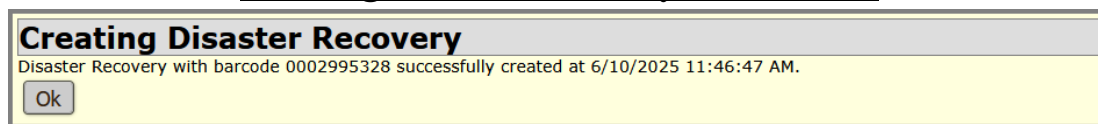


When the data fields are complete, the next step is to **Save** the information.

These options are located at the Create Disaster Recovery screen's top right:

- **Cancel:** Click once to cancel the create process for this item. It will not be saved.
- **Set Defaults:** Do not click Set Defaults. Selecting this can compromise the Create process.
- **Save & Close:** Click once if:
 - selecting Save & New has been used for a set of items and the final item has been data entered.
- **OR**
 - Request Pickup is not going to be completed at this time. Search will need to be completed later to find the unrequested item to complete Request Pickup.
- **Save & View:** Click once if only one item is to be created and Request Pickup is ready to be completed.
- **Save & New:** Click once to create another Disaster Recovery box. For convenience, some fields will carry forward to eliminate repeated data entry. Fields carried forward are still editable. See **Save & Close** after data entering the final item.

Creating Disaster Recovery information



The create progress bar will display; if the above information does not appear, an error message appears at the top of the screen. Correct the error and click the original save option.

When the above dialogue box appears, it includes the Disaster Recovery Barcode that was generated for this Disaster Recovery box. The barcode is the unique identification number applied to each item created in Gimmel. Click once on **Ok**. Then, if selected:

- **Save & Close:** The boxes are (or the box is) saved and the Disaster Recovery home page appears. Turn to ***Request Pickup: Send/Return Items to the SRC*** (Page 93) to have the box (es) picked up by the SRC. Use the Comments field to tell when the SRC Driver should be at the agency for pickup.
- **Save & View:** The box is saved. View Disaster Recovery is the screen to review the box just created. If the box is ready to be picked up by the SRC, turn to ***Request Pickup: Send/Return Items to the SRC*** (Page 93) to have the box picked up by the SRC. Use the Comments field to tell when the SRC Driver should be at the agency for pickup.
- **Save & New:** The box is saved. Another Create a new Disaster Recovery screen appears.

BOXYBIT *Any agency employee requesting pickup or delivery for Disaster Recovery items or in-person access to items in the Disaster Recovery vault must be listed on the RMD 113 Disaster Recovery Service Approval Form on file at the SRC. Those are the only employees who see the Request option in the Activity menu. Contact the agency's Records Management team to get added to the RMD 113 form.*

NOTES

[illegible]

Microfilm: Use ‘Create’ to Add Reels

Create is used to create one or several microfilm reels one container at a time.

BOXYBIT There are a couple of ways for a client to create microfilm reels in Gimmal (as illustrated in this guide); this is the preferred method to create any number of microfilm reels.

Some information about microforms

The Microforms item type tab is used for items identified as:

- **16mm Microfilm**
 - **16mm-2.5MIL***: 16 millimeter film with a thickness of 2.5 mil
 - **16mm-5MIL***: 16 millimeter film with a thickness of 5 mil
 - **35mm Microfilm**
 - **Microfiche**
- (*1 mil = 0.001 of an inch)

Create a microfilm reel

The screenshot shows the Gimmal web application interface. At the top, there's a navigation bar with various icons and a 'Logout' button. Below this, there's a tabbed interface with 'Microforms' selected. The main area contains a form with fields for 'Microform Barcode', 'Organization Quick Description', 'Agency Name', 'Division Name', 'Imaging Production Barcode', 'AIN', 'Record Series Title', and 'Agency Reel Number'. There are also fields for 'Eligible Destruction Date', 'Accessioned', 'Deleted', 'Create Date', 'Created By Description', 'Last Modified Date', 'Last Modified By Description', and 'Hold Retention'. A 'Legacy Tracking Number' field is also present. Below the form, there are 'Search' and 'Clear' buttons, and a '(Rollover for Current Search)' button. At the bottom, there's a 'Request' dropdown menu with 'Create & Update' selected, and a 'View' dropdown menu. A red arrow points to the 'Create' button in the 'Create & Update' dropdown menu. The interface also shows a table with columns for 'Home Location', 'Organization Quick Description', 'AIN', 'Record Series Title', 'Event Code', 'Years', 'Months', 'Days', 'AC Definition', 'Archival', 'Film Type', 'Film Size', and 'Agency Reel Number'.

1. Click once on the **Microforms** item type tab.
2. Click once on **Create & Update** in the Action Buttons.
3. Click once on **Create** from the dropdown menu.

Microfilm: Use 'Create' to Add Reels

Create Microform screen

Home
Preferences
Reports
Requests
Admin
Dashboard
Help
Print
0:18:12
Logout

Create Microform
Cancel
Set Defaults
Save & Close
Save & View
Save & New

Fields marked with an * are required.

***Organization:**

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Deleted	Organization Quick Description
Search Here:					

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

Search
Clear

***Records Series:**

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years
Search Here:					
Months	Days	AC Definition	Remarks		

Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button.

Search
Clear

Imaging Production:

Add

Imaging Production Barcode	Organization Quick Description	Agency Name	Division Name	Contact Name
Search Here:				

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.

Search
Clear

*Film Type:

*Film Size:

*Earliest File Date:

*Latest File Date:

*Drive Date:

*Agency Reel Number:

*Beginning File:

*Ending File:

Image Count:

Notes:

Legacy Tracking Number:

Legacy Notes:

Accessioned: ☐

Legal Holds:

Select All
Remove All
Legal Holds selected: 0
Selected Legal Holds

Page 1 | Jump to Page: Go

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
Legal Holds						
Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	
Search Clear (Rollover for Current Search) Switch						
Page 1 Jump to Page: Go						
The search found 0 Legal Holds						
Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	

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Microfilm: Use 'Create' to Add Reels

BOXYBIT All fields with an asterisk (*) are required fields. The page cannot process without completing these required fields.

*Organization

*Organization: 5

Agency Name **Division Name** **Business Unit Name** **Business Sub-Unit Name** **Deleted** **Organization Quick Description**

Search Here:

Current Search: Find all Organization.

1

Page 1 | Jump to Page: The search found 6 Items

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Deleted	Organization Quick Description
☐ Texas Big State Agency - 988	Central			False	Texas Big State Agency - 988 - Central - -
☐ Texas Big State Agency - 988	East			False	Texas Big State Agency - 988 - East - -
☐ Texas Big State Agency - 988	West			False	Texas Big State Agency - 988 - West - -
☐ Texas Big State Agency - 988	North			False	Texas Big State Agency - 988 - North - -
☐ Texas Big State Agency - 988	South			False	Texas Big State Agency - 988 - South - -
☐ 988 - Gimmel Organization Control				False	988 - Gimmel Organization Control - - -

Click once **(1)** on **Search** to find all Organizations assigned to the account or use the **Quick Search** area **(2)** to find a specific Organization then click Search. Select the **Organization** associated with this item by clicking once **(3)** on the radio button at the left side of the screen. Do not select **(4)** the **Gimmel Organization Control**. It is here for technical reasons. The selected Organization will populate **(5)** in the **Organization** field.

BOXYBIT Is the needed Organization missing? Contact the agency's Records Management team.

*Records Series

*Records Series: 3

Organization Quick Description **AIN** **RSIN** **Record Series Title** **Event Code** **Years**

Search Here:

Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button.

2

Page 1 [2] [3] [4] [5] [6] | Jump to Page: The search found 54 Items

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Remarks
☐ Texas Big State Agency - 988 - -	38		Transmittals - Original	AC	3			AC=Latest page date	
☐ Texas Big State Agency - 988 - -	02		Client Questionnaire	N/A	8				
☐ Texas Big State Agency - 988 - -	03		Data Entry Form	US	2	6			
☐ Texas Big State Agency - 988 - -	04		Notice of Possible Eligibility	AC	15			AC=Feb. 2 following the latest file	

Records Series is a combination of Agency Item Number (AIN) and Record Series Title on the agency's Records Retention Schedule. The item created in Gimmel must have a Records Series assigned to it. Select the Record Series Title by clicking once **(1)** on the radio button at the left side of the screen. Use the Quick Search fields **(2)** to find a specific Record Series Title or to narrow the selection of available Record Series Titles. The selection populates **(3)** in the **Records Series** field.

BOXYBIT Is the needed Records Series missing? Contact the agency's Records Management team.

The Records Series section can be used to reset the timer. Please see **Supplemental Information: Timer** (Page 191).

How these fields look when completed:

*Organization: Texas Big State Agency - 988 - East - -

Agency Name **Division Name** **Business Unit Name** **Business Sub-Unit Name** **Organization Quick Description**

Search Here:

Current Search: Find all Organization.

*Records Series: 02 - Client Questionnaire

Organization Quick Description **AIN** **RSIN** **Record Series Title** **Event Code** **Years**

Search Here:

Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button.

Microfilm: Use 'Create' to Add Reels

Imaging Production

Imaging Production: Add

Imaging Production Barcode	Organization Quick Description	Agency Name	Division Name	Contact Name

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button. Search Clear

Imaging Production (IP) is used by the SRC to create IP items. **Do not complete this field.**

*Film Type

*Film Type:

- Film: Duplicate-Diazo
- Film: Duplicate-Silver
- Film: Original
- Film: Quarantined16mm
- Film: Quarantined35mm
- Film: QuarantinedFiche
- Microfiche
- Microfiche-Duplicate
- Scans

Film Type: The only two options for microfilm storage at the SRC are (select one):

- **Film: Duplicate-Silver:** More durable microfilm used for archival or permanent information on a non-original version of film.
- **Film: Original:** The first generation of a roll of microfilm.

BOXYBIT The other options not available for microfilm storage at the SRC are used for damaged microfilm, damaged microfiche, non-storable Diazo microfilm, microfiche, microfiche duplicates, Scan On Demand, or Imaging Production.

How these fields look when completed:

Imaging Production: Add

Imaging Production Barcode	Organization Quick Description	Agency Name	Division Name	Contact Name

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button. Search Clear

*Film Type:

Microfilm: Use 'Create' to Add Reels

*Film Size

*Film Size:

- Film: MR16-2.5 MIL
- Film: MR16-5 MIL
- Film: MR35
- Microfiche
- Scan - B&W 200 DPI
- Scan - B&W 300 DPI
- Scan - B&W 400 DPI
- Scan - B&W 600 DPI
- Scan - COLOR 400 DPI
- Scan Large Format - 200-300 DPI
- Scan Large Format - up to 600 DPI
- Scan Microfiche to digital
- Scan Microform to Digital

Film Size: The only options for microfilm storage at the SRC are (select one):

- **Film: MR16-2.5 MIL***: 16 millimeter film with a thickness of 2.5 mil
- **Film: MR16-5 MIL***: 16 millimeter film with a thickness of 5 mil
- **Film: MR35**: 35 millimeter film

*1 mil = 0.001 of an inch

BOXYBIT *The other options not available for microfilm storage at the SRC are used for microfiche, Scan On Demand, or some Imaging Production projects.*

*Earliest File Date

*Earliest File Date:

The **Earliest File Date** is the earliest date for all items in the reel. The date information is entered in this format with forward slashes and no spaces:

MM/DD/YYYY

Optional step: Click the calendar icon  to select the date from the calendar.

Data Example: 01/01/2025

*Latest File Date

*Latest File Date:

The **Latest File Date** is the latest date for all items in the reel. The date information is entered in this format with forward slashes and no spaces:

MM/DD/YYYY

Optional step: Click the calendar icon  to select the date from the calendar.

Data Example: 05/31/2025

BOXYBIT *If the Earliest File Date and the Latest File Date are the same, enter the same date into both fields.*

How these fields look when completed:

*Film Size:

*Earliest File Date:

*Latest File Date:

Microfilm: Use 'Create' to Add Reels

*Drive Date

*Drive Date: 

Enter a date MM/DD/YYYY or click the calendar icon to select a Drive Date. Gimmel uses Drive Date in conjunction with retention (Event Code, Years, Months, Days) to calculate an Eligible Destruction Date. Drive Date is not Eligible Destruction Date unless there is no data in all three fields for Years, Months, Days.

BOXYBIT Please see **Supplemental Information: Drive Date** (Page 179).

Data Example: 05/31/2025

*Agency Reel Number

*Agency Reel Number:

Agency Reel Number is the container identification number the client assigns to this microfilm reel. The Agency Reel Number can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Reel Number. The Pipe symbol is used as a delimiter when exporting information. Do not use duplicate reel numbers in the same shipment.

Data Example: Reel 16

*Beginning File

*Beginning File:

Beginning File is composed of the first image on the film reel. The information on the image represents what is entered in this field. The only restriction: Do not use a Pipe symbol | as part of the file name. The Pipe symbol is used as a delimiter when exporting information. Do not press the Enter/Return key on the keyboard.

Data Example: Allen, Joey

*Ending File

*Ending File:

Ending File is composed of the last image on the film reel. The information on the last image represents what is entered in this field. If the beginning file name and ending file name are identical, repeat the entry from Beginning File field. The only restriction: Do not use a Pipe symbol | as part of the file names. The Pipe symbol is used as a delimiter when exporting information. Do not press the Enter/Return key on the keyboard.

Data Example: Zymbrook, Elijah

Image Count

Image Count:

Image Count is a field used in conjunction with Imaging Production and it cannot be data entered. The software does not allow it to be hidden during this process.

How these fields look when completed:

*Drive Date: 05/31/2025 

*Agency Reel Number: Reel 16

*Beginning File: Allen, Joey

*Ending File: Zymbrook, Elijah

Microfilm: Use 'Create' to Add Reels

Notes

Notes:

Notes is an optional field for additional information about this microfilm reel. Any character can be used except for the Pipe symbol. Do not press the Enter/Return key on the keyboard.

Data Example: Employee surveys for HR.

Disregard these fields

Legacy Tracking Number:

Legacy Notes:

Accessioned: ☐

Legacy Tracking #, **Legacy Notes**, and **Accessioned** are fields that cannot be data entered. The software does not allow them to be hidden during this process.

Legal Holds

The **Legal Holds** section is provided to place items on hold to keep them from being eligible for destruction. *Please see Supplemental Information: Hold (Page 197). This is usually done as an update at a later date.*

Legal Holds:

The screenshot shows the 'Legal Holds' section of a software interface. At the top, there are buttons for 'Add', 'Select All', and 'Remove All', followed by 'Legal Holds selected: 0'. Below this is a 'Selected Legal Holds' section with a table header: 'Quick Description', 'Hold Code', 'Hold Name', 'Hold Status', 'Hold Type', 'Authorized By Individual', and 'Released By Individual'. Below the header is a table with one row containing a lock icon and the text 'Legal Holds'. Below the table are input fields for 'Hold Code', 'Hold Name', 'Hold Status', 'Hold Type', 'Authorized By Individual', and 'Released By Individual'. Below these fields are buttons for 'Search', 'Clear', '(Rollover for Current Search)', and 'Switch'. At the bottom, there is a pagination bar with 'Page 1 | Jump to Page: [] Go' and 'The search found 0 Legal Holds'. Below the pagination bar is another table header: 'Hold Code', 'Hold Name', 'Hold Status', 'Hold Type', 'Authorized By Individual', and 'Released By Individual'.

How these fields look when completed:

Notes: Employee surveys for HR.

Legacy Tracking Number:

Legacy Notes:

Accessioned: ☐

Legal Holds:

This screenshot is identical to the one above, showing the 'Legal Holds' section of the software interface. It displays the same buttons, table headers, input fields, and pagination bar, indicating that the fields are in the same state as in the previous screenshot.

Microfilm: Use 'Create' to Add Reels

Completed: Create Microform screen:

[Home](#)
[Preferences](#)
[Reports](#)
[Requests](#)
[Admin](#)
[Dashboard](#)
[Help](#)
[Print](#)
0:17:12
[Logout](#)

Create Microform

[Cancel](#)
[Set Defaults](#)
[Save & Close](#)
[Save & View](#)
[Save & New](#)

Fields marked with an * are required.

*Organization: **Texas Big State Agency - 988 - East - -**

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Deleted	Organization Quick Description
Search Here:	East				

Current Search: Find all Organization where Division Name Contains 'east'.

Page 1 | Jump to Page: Go The search found 1 Item

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Deleted	Organization Quick Description
☒	Texas Big State Agency - 988	East		False	Texas Big State Agency - 988 - East - -

*Records Series: **02 - Client Questionnaire**

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years
Search Here:	02				

Current Search: Find all Records Series where AIN Contains '02'.

Page 1 | Jump to Page: Go The search found 1 Item

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Remarks
☒	Texas Big State Agency - 988 - - -	02	Client Questionnaire	N/A	8				

Imaging Production:

Imaging Production Barcode	Organization Quick Description	Agency Name	Division Name	Contact Name
Search Here:				

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.

*Film Type: Film: Original

*Film Size: Film: MR16-5 MIL

*Earliest File Date: 01/01/2025

*Latest File Date: 05/31/2025

*Drive Date: 05/31/2025

*Agency Reel Number: Reel 16

*Beginning File: Allen, Joey

*Ending File: Zymbrook, Elijah

Image Count:

Notes: Employee surveys for HR.

Legacy Tracking Number:

Legacy Notes:

Accessioned: ☐

Legal Holds:

Select All Remove All Legal Holds selected: 0

Page 1 | Jump to Page: Go

Quick Description Hold Code Hold Name Hold Status Hold Type Authorized By Individual Released By Individual

Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
Search	Clear	(Rollover for Current Search)		Switch	

Page 1 | Jump to Page: Go The search found 0 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
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Microfilm: Use 'Create' to Add Reels

Save Options

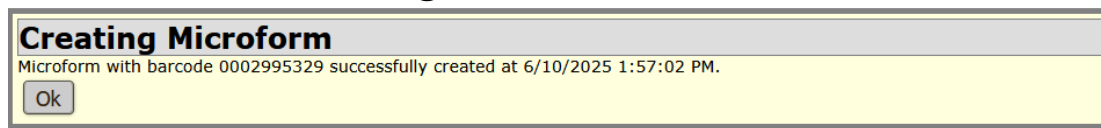


When the data fields are complete, the next step is to **Save** the information.

These options are located at the Create Microform screen's top right:

- **Cancel:** Click once to cancel the create process for this item. It will not be saved.
- **Set Defaults:** Do not click Set Defaults. Selecting this can compromise the Create process.
- **Save & Close:** Click once if:
 - selecting Save & New has been used for a set of items and the final item has been data entered.
- **OR**
 - Request Pickup is not going to be completed at this time. Search will need to be completed later to find the unrequested item to complete Request Pickup.
- **Save & View:** Click once if only one item is to be created and Request Pickup is ready to be completed.
- **Save & New:** Click once to create another item. For convenience, some fields will carry forward to eliminate repeated data entry. Fields carried forward are still editable. See **Save & Close** after data entering the final item.

Creating Microform information



If the above information does not appear, an error message appears at the top of the screen. Correct the error and click the original save option.

When the above screen appears, it includes the Microform Barcode that was generated for this microfilm reel. The Microform Barcode is the unique identification number applied to each item created in Gimmel. Click once on **Ok**. Then, if selected:

- **Save & Close:** The film reel is saved and the Microforms home page appears. Turn to ***Request Pickup: Send/Return Items to the SRC*** (Page 93) to have the microfilm picked up by the SRC.
- **Save & View:** The film reel is saved. View Microform is the screen to review the microfilm reel just created. The reel has been saved in Gimmel. Turn to ***Request Pickup: Send/Return Items to the SRC*** (Page 93) to have the microfilm picked up by the SRC.
- **Save & New:** The film reel is saved. Another Create Microform screen appears. Some fields carried forward from the previous microfilm reel created but all fields are editable.

NOTES

[illegible]

Microfilm: Use ‘Bulk Create’ to Add Reels

Bulk Create is used to create several microfilm reels all at once.

BOXYBIT *The microfilm reels are created for the same Organization and the same Record Series. The data entry for the first reel applies to all of the reels; the data fields for each reel can be modified later.*

Some information about microforms

The Microforms item type tab is used for items identified as:

- **16mm Microfilm**
 - **16mm-2.5MIL***: 16 millimeter film with a thickness of 2.5 mil
 - **16mm-5MIL***: 16 millimeter film with a thickness of 5 mil
- **35mm Microfilm**
- **Microfiche**
(*1 mil = 0.001 of an inch)

Bulk Create microfilm reels

The screenshot shows the Gimmal application interface for creating microfilm reels. The 'Microforms' tab is selected in the top navigation bar. The main form contains fields for Microform Barcode, Organization Quick Description, Agency Name, Division Name, Imaging Production Barcode, AIN, Record Series Title, and Agency Reel Number. Below these are fields for Eligible Destruction Date, Accessioned, Deleted, Date Date, Created By Description, Last Modified Date, Last Modified By Description, and Hold Retention. A 'Search' button is present. At the bottom, there is a 'Request' dropdown menu with 'Create & Update' selected, and a 'View' dropdown menu. A red arrow points to the 'Bulk Create' option in the 'Create & Update' dropdown menu. Another red arrow points to the 'Microforms' tab in the top navigation bar. A third red arrow points to the 'Create & Update' dropdown menu.

1. Click once on the **Microforms** item type tab.
2. Click once on **Create & Update** in the Action Buttons.
3. Click once on **Bulk Create** from the dropdown menu.

Microfilm: Use 'Bulk Create' to Add Reels

Bulk Create New Microforms screen

Gimmel
Home Preferences Reports Requests Admin Dashboard Help Print 0:19:55 Logout

Bulk Create New Microforms
Cancel Create Items

Fields marked with an * are required.
Number of items to create:

***Organization:**

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Quick Description
Search Here:				
Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.				
Search Clear				

***Records Series:**

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years
Search Here:					
Months	Days	AC Definition	Remarks		
Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button.					
Search Clear					

Imaging Production: Add

Imaging Production Barcode	Organization Quick Description	Agency Name	Division Name	Contact Name
Search Here:				
Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.				
Search Clear				

***Film Type:**

***Film Size:**

***Earliest File Date:**

***Latest File Date:**

***Drive Date:**

***Agency Reel Number:**

***Beginning File:**

***Ending File:**

Image Count:

Notes:

Legacy Tracking Number:

Legacy Notes:

Accessioned: ☐

Legal Holds:

Select All Remove All Legal Holds selected: 0
Selected Legal Holds

Page 1 | Jump to Page: Go

Quick Description Hold Code Hold Name Hold Status Hold Type Authorized By Individual Released By Individual

Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
Search Clear (Rollover for Current Search) Switch					

Page 1 | Jump to Page: Go
The search found 0 Legal Holds

Hold Code Hold Name Hold Status Hold Type Authorized By Individual Released By Individual

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Microfilm: Use 'Bulk Create' to Add Reels

Number of items to create

Number of items to create:

Enter the number of microfilm reels to be created.

BOXYBIT At this point, continue the data entry by turning to **Microfilm: Use 'Create' to Add Reels** (Page 59) and choose the Organization. *When data entry is complete, continue the process below then see Page 70 to save the data entry.*

Completed: Bulk Create New Microforms screen:

Fields marked with an * are required.
Number of items to create:

*Organization: Texas Big State Agency - 988 - North - -

Search Here: North Deleted Organization Quick Description

Current Search: Find all Organization where Division Name Contains 'North'.

Page 1 | Jump to Page: Go The search found 1 Item

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Deleted	Organization Quick Description
Texas Big State Agency - 988	North			False	Texas Big State Agency - 988 - North - -

*Records Series: 53 - Contracts

Search Here: 53

Current Search: Find all Records Series where AIN Contains '53'.

Page 1 | Jump to Page: Go The search found 1 Item

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Remarks
Texas Big State Agency - 988 - - -	53		Contracts	AC	20			AC=Termination of Contract	

Imaging Production:

Search Here:

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.

*Film Type: Film: Original

*Film Size: Film: MR35

*Earliest File Date: 01/01/2015

*Latest File Date: 06/30/2025

*Drive Date: 06/30/2025

*Agency Reel Number: C-06/30/2025

*Beginning File: Contracts closed files 2015

*Ending File: Contracts closed files 2025

Image Count:

Notes:

Legacy Tracking Number:

Legacy Notes:

Accessioned: ☐

Legal Holds: Legal Holds selected: 0

Page 1 | Jump to Page: Go

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual

(Rollover for Current Search)

Page 1 | Jump to Page: Go The search found 0 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
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Microfilm: Use 'Bulk Create' to Add Reels

Save

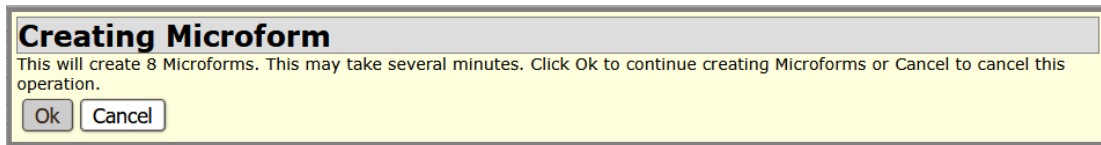


When data entry is complete, the next step is to **Save** the information.

The save option is located at the Bulk Create New Microforms screen's top right:

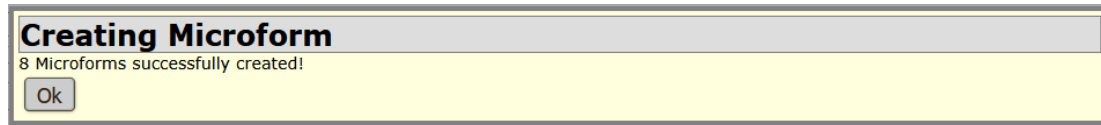
- **Cancel:** Click once to cancel the create process for these items. They will not be saved.
- **Create Items:** Click once to create the microfilm reels.

Creating Microform information



If the above message does not appear telling how many reels are to be created, an error message appears at the top of the screen. Correct the error and click the save option, again. Click once on **Ok**.

BOXYBIT *Do not click Ok more than once or Gimmel will duplicate the number of reels being created. If duplicate reels are created, send an email to gimmel@tsl.texas.gov and include a list of the microforms barcodes to be deleted. Do not send a screengrab image.*



When the above message appears, click once on **Ok**. Then, turn to ***Request Pickup: Send/Return Items to the SRC*** (Page 93) to have the microfilm reels picked up by the SRC.

Microfilm: Use 'Bulk Create' to Add Reels

NOTES

[illegible]

NOTES

[illegible]

Microfiche: Use ‘Create’ to Add Bundles

Create is used to create one or several microfiche bundles one container at a time.

BOXYBIT *There are several ways for a client to create microfiche bundles in Gimmal (as illustrated in this guide); this is the preferred method to create any number of microfilm bundles.*

Some information about microforms

The Microforms item type tab is used for items identified as:

- **16mm Microfilm**
 - **16mm-2.5MIL***: 16 millimeter film with a thickness of 2.5 mil
 - **16mm-5MIL***: 16 millimeter film with a thickness of 5 mil
 - **35mm Microfilm**
 - **Microfiche**
- (*1 mil = 0.001 of an inch)

Bundle Microfiche Jackets

It is a good rule to bundle microfiche jackets before creating the items in Gimmal. A **jacket** is a single sheet of microfiche containing many images of microfilm sliced and inserted into microfiche jackets. A **bundle** is a small collection of microfiche jackets for the same Organization and Record Series Title that have been grouped together from a large amount of microfiche jackets.

- Group the microfiche jackets into bundles. It is a good way to get organized and this will help the SRC locate microfiche jackets or microfiche bundles when a delivery request is received.
- The bundles can be grouped into any amount but a good measure is to limit the bundles to no more than 200 microfiche jackets per microfiche bundle.
- When completing Gimmal data entry, each bundle is created as a separate container and the Fiche Count field is used to identify how many microfiche jackets are in that bundle.

BOXYBIT *It is recommended that the microfiche jackets be in protective microfiche envelopes, grouped by the title on the jackets. Envelopes look like small paper folders sealed on three sides and open at the top long edge. Please place a small piece of paper or index card at the start and end of each bundle so it is obvious where the bundle begins and ends. **Do not use rubber bands.***

Create microfiche bundles

The screenshot shows the Gimmal web application interface. At the top, there is a navigation bar with links to Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. Below this is a sub-navigation bar with tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The Microforms tab is selected. The main form area contains fields for Microform Barcode, Organization Quick Description, Agency Name, Division Name, Imaging Production Barcode, AIN, Record Series Title, Agency Reel Number, Eligible Destruction Date, Accessioned, Deleted, Create Date, Created By Description, Last Modified Date, Last Modified By Description, Hold Retention, and Legacy Tracking Number. Below these fields are buttons for Search, Clear, and a Rollover for Current Search. At the bottom, there is a dropdown menu for Request, and a Create & Update dropdown menu. The Create & Update dropdown menu is open, showing options: Create, Bulk Create, Update, Bulk Update, and Search & Replace. Red arrows and numbers 1, 2, and 3 indicate the steps: 1. Click on the Microforms tab. 2. Click on the Create & Update dropdown menu. 3. Click on the Create option in the dropdown menu.

1. Click once on the **Microforms** item type tab.
2. Click once on **Create & Update** in the Action Buttons.
3. Click once on **Create** from the dropdown menu.

Microfiche: Use 'Create' to Add Bundles

Create Microform screen

Home
Preferences
Reports
Requests
Admin
Dashboard
Help
Print
0:19:45
Logout

Create Microform
Cancel
Set Defaults
Save & Close
Save & View
Save & New

Fields marked with an * are required.

***Organization:**

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Quick Description
Search Here:				

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

***Records Series:**

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years
Search Here:					
Months	Days	AC Definition	Remarks		

Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button.

Imaging Production:

Add

Imaging Production Barcode	Organization Quick Description	Agency Name	Division Name	Contact Name
Search Here:				

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.

***Film Type:**

***Film Size:**

***Earliest File Date:**

***Latest File Date:**

***Drive Date:**

***Agency Reel Number:**

***Beginning File:**

***Ending File:**

Image Count:

Notes:

Legacy Tracking Number:

Legacy Notes:

Accessioned: ☐

Legal Holds:

Select All
Remove All
Legal Holds selected: 0
Selected Legal Holds

Page 1 | Jump to Page: Go

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
Legal Holds						
	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual

Search Clear (Rollover for Current Search) Switch

Page 1 | Jump to Page: Go
The search found 0 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
-----------	-----------	-------------	-----------	--------------------------	------------------------

Microfiche: Use 'Create' to Add Bundles

BOXYBIT All fields with an asterisk (*) are required fields. The page cannot process without completing these required fields.

*Organization

*Organization: 5

Agency Name

Search Here:

Division Name

Business Unit Name

Business Sub-Unit Name

Deleted

Organization Quick Description

Current Search: Find all Organization.

1 Search Clear

Page 1 | Jump to Page: Go The search found 6 Items

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Deleted	Organization Quick Description
☐ Texas Big State Agency - 988	Central			False	Texas Big State Agency - 988 - Central - -
☐ Texas Big State Agency - 988	East			False	Texas Big State Agency - 988 - East - -
☐ Texas Big State Agency - 988	West			False	Texas Big State Agency - 988 - West - -
☐ Texas Big State Agency - 988	North			False	Texas Big State Agency - 988 - North - -
☐ Texas Big State Agency - 988	South			False	Texas Big State Agency - 988 - South - -
☐ 988 - Gimmal Organization Control				False	988 - Gimmal Organization Control - - -

Click once (1) on **Search** to find all Organizations assigned to the account or use the **Quick Search** area (2) to find a specific Organization then click Search. Select the **Organization** associated with this item by clicking once (3) on the radio button at the left side of the screen. Do not select (4) the Gimmal Organization Control. It is here for technical reasons. The selected Organization will populate (5) in the **Organization** field.

BOXYBIT Is the needed Organization missing? Contact the agency's Records Management team.

*Records Series

*Records Series: 3

Organization Quick Description

Search Here:

AIN

RSIN

Record Series Title

Event Code

Years

Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button.

Search Clear

Page 1 [2] [3] [4] [5] [6] | Jump to Page: Go The search found 54 Items

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Remarks
☐ Texas Big State Agency - 988 - -	38		Transmittals - Original	AC	3			AC=Latest page date	
☐ Texas Big State Agency - 988 - -	02		Client Questionnaire	N/A	8				
☐ Texas Big State Agency - 988 - -	03		Data Entry Form	US	2	6			
☐ Texas Big State Agency - 988 - -	04		Notice of Possible Exclusion	AC	15			AC=Feb. 2 following the latest file	

Records Series is a combination of Agency Item Number (AIN) and Record Series Title on the agency's Records Retention Schedule. The item created in Gimmal must have a Records Series assigned to it. Select the Record Series Title by clicking once (1) on the radio button at the left side of the screen. Use the Quick Search fields (2) to find a specific Record Series Title or to narrow the selection of available Record Series Titles. The selection populates (3) in the **Records Series** field.

BOXYBIT Is the needed Records Series missing? Contact the agency's Records Management team. The Records Series section can be used to reset the timer. Please see **Supplemental Information: Timer** (Page 191).

How these fields look when completed:

*Organization: Texas Big State Agency - 988 - North - -

Agency Name

Search Here:

Division Name

Business Unit Name

Business Sub-Unit Name

Organization Quick Description

Current Search: Find all Organization where Division Name Contains 'NORTH'.

Search Clear

Page 1 | Jump to Page: Go The search found 0 Items

*Records Series: 11 - Federal Tax Records

Organization Quick Description

Search Here:

AIN

RSIN

Record Series Title

Event Code

Years

Current Search: Find all Records Series where Record Series Title Contains 'Federal Tax Records'.

Search Clear

Page 1 | Jump to Page: Go The search found 1 Item

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Remarks
☒ Texas Big State Agency - 988 - -	11		Federal Tax Records	FE	10				

Microfiche: Use 'Create' to Add Bundles

Imaging Production

Imaging Production: Add

Imaging Production Barcode	Organization Quick Description	Agency Name	Division Name	Contact Name

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button. Search Clear

Imaging Production (IP) is used by the SRC to create IP items. Do not complete this field.

Film Type

*Film Type: ▼

Film: Duplicate-Diazo

Film: Duplicate-Silver

Film: Original

Film: Quarantined16mm

Film: Quarantined35mm

Film: QuarantinedFiche

Microfiche

Microfiche-Duplicate

Scans

Film Type: The only option for microfiche storage at the SRC is:

- Microfiche

BOXYBIT The other options not available for microfiche storage at the SRC are used for microfilm, damaged microfilm, damaged microfiche, non-storable Diazo microfilm, microfiche duplicates, Scan On Demand, or Imaging Production.

How this field looks when completed:

Imaging Production: Add

Imaging Production Barcode	Organization Quick Description	Agency Name	Division Name	Contact Name

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button. Search Clear

*Film Type: Microfiche ▼

Microfiche: Use 'Create' to Add Bundles

*Film Size

*Film Size:

- Film: MR16-2.5 MIL
- Film: MR16-5 MIL
- Film: MR35
- Microfiche 
- Scan - B&W 200 DPI
- Scan - B&W 300 DPI
- Scan - B&W 400 DPI
- Scan - B&W 600 DPI
- Scan - COLOR 400 DPI
- Scan Large Format - 200-300 DPI
- Scan Large Format - up to 600 DPI
- Scan Microfiche to digital
- Scan Microform to Digital

Film Size: The only option for microfiche storage at the SRC is:

- **Microfiche**

BOXYBIT *The other options not available for microfiche storage at the SRC are used for microfilm, Scan On Demand, or Imaging Production.*

*Earliest File Date

*Earliest File Date: 

The **Earliest File Date** is the date information for the earliest date for all items in the microfiche bundle. The date information is entered in this format with forward slashes and no spaces:

MM/DD/YYYY

Optional step: Click the calendar icon  to select the date from the calendar.

Data Example: 09/01/2024

*Latest File Date

*Latest File Date: 

The **Latest File Date** is the date information for the latest date for all items in the microfiche bundle. The date information is entered in this format with forward slashes and no spaces:

MM/DD/YYYY

Optional step: Click the calendar icon  to select the date from the calendar.

Data Example: 05/31/2025

BOXYBIT *If the Earliest File Date and the Latest File Date are the same, enter the same date into both fields.*

How these fields look when completed:

*Film Size: 

*Earliest File Date: 

*Latest File Date: 

Microfiche: Use 'Create' to Add Bundles

*Drive Date

*Drive Date: 

Enter a date MM/DD/YYYY or click the calendar icon to select a Drive Date. Gimmel uses Drive Date in conjunction with retention (Event Based, Years, Months, Days) to calculate an Eligible Destruction Date. Drive Date is not Eligible Destruction Date unless there is no data in all three fields for Years, Months, Days.

BOXYBIT Please see **Supplemental Information: Drive Date (Page 179)**.
Data Example: 08/31/2025

*Agency Reel Number

*Agency Reel Number:

Agency Reel Number is the container identification number the client assigns to this item. Make sure this information is on the piece of paper or the microfiche envelope at the start of this microfiche bundle. The Agency Reel Number can be numbers, letters, symbols, or any combination thereof. The only restriction: Do not use a Pipe symbol | as part of the Agency Reel Number. The Pipe symbol is explained in Beginning File | Ending File Range. Do not use duplicate reel numbers in the same shipment.

Data Example: M9114

*Beginning File

*Beginning File:

The **Beginning File** is composed of the title bar on the first microfiche jacket in the bundle. The only restriction: Do not use a Pipe symbol | as part of the file name. The Pipe symbol is used as a delimiter when exporting information. Do not press the Enter/Return key on the keyboard.

Data Example: ID# XXXXXX825

*Ending File

*Ending File:

The **Ending File** is composed of the title bar on the last microfiche jacket in the bundle. If the beginning file and ending file names are identical, repeat the entry from Beginning File field. The only restriction: Do not use a Pipe symbol | as part of the file name. The Pipe symbol is used as a delimiter when exporting information. Do not press the Enter/Return key on the keyboard.

Data Example: ID# XXXXXX037

How these fields look when completed:

*Drive Date: 

*Agency Reel Number:

*Beginning File:

*Ending File:

Microfiche: Use 'Create' to Add Bundles

*Fiche Count

Fiche Count:

***Fiche Count** is the number of microfiche jackets in this bundle. Write this number on the piece of paper or the microfiche envelope at the start of this microfiche bundle. This field is used to calculate billing for storage.

Data Example: 170

Image Count

Image Count:

Image Count is a field used in conjunction with Imaging Production and it cannot be data entered. The software does not allow it to be hidden during this process.

Notes

Notes:

Notes is an optional field for additional information about this microfiche bundle. Any character can be used except for the Pipe symbol. Do not press the Enter/Return key on the keyboard.

Disregard these fields

Legacy Tracking #:

Legacy Notes:

Accessioned: ☐

Legacy Tracking #, **Legacy Notes**, and **Accessioned** are fields that cannot be data entered. The software does not allow them to be hidden during this process.

How these fields look when completed:

Fiche Count:

Image Count:

Notes:

Legacy Tracking Number:

Legacy Notes:

Accessioned: ☐

Legal Holds

The **Legal Holds** section is provided to place items on hold to keep them from being eligible for destruction. *Please see **Supplemental Information: Hold** (Page 197). This is usually done as an update at a later date.*

Legal Holds:

AddSelect AllRemove AllLegal Holds selected: 0

Selected Legal Holds

Page 1 | Jump to Page: Go

Quick DescriptionHold CodeHold NameHold StatusHold TypeAuthorized By IndividualReleased By Individual

Legal Holds

Hold CodeHold NameHold StatusHold TypeAuthorized By IndividualReleased By Individual

SearchClear(Rollover for Current Search)Switch

Page 1 | Jump to Page: GoThe search found 0 Legal Holds

Hold CodeHold NameHold StatusHold TypeAuthorized By IndividualReleased By Individual

Microfiche: Use 'Create' to Add Bundles

Completed: Create Microform screen:

Home Preferences Reports Requests Admin Dashboard Help Print 0:16:40 Logout

Create Microform

Cancel Set Defaults Save & Close Save & View Save & New

Fields marked with an * are required.

*Organization: Texas Big State Agency - 988 - North - -

Agency Name

Division Name

Business Unit Name

Business Sub-Unit Name

Organization Quick Description

Search Here: NORTH

Current Search: Find all Organization where Division Name Contains 'NORTH'.

Search Clear

Page 1 | Jump to Page: Go The search found 1 Item

Organization Quick Description

Texas Big State Agency - 988 - North - -

*Records Series: 11 - Federal Tax Records

Organization Quick Description

AIN

RSIN

Record Series Title

Event Code

Years

Search Here: Months Days AC Definition Remarks

Current Search: Find all Records Series where Record Series Title Contains 'Federal Tax Records'.

Search Clear

Page 1 | Jump to Page: Go The search found 1 Item

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Remarks
Texas Big State Agency - 988 - - -	11		Federal Tax Records	FE	10				

Imaging Production:

Imaging Production Barcode

Organization Quick Description

Agency Name

Division Name

Contact Name

Search Here:

Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button.

Search Clear

*Film Type: Microfiche

*Film Size: Microfiche

*Earliest File Date: 09/01/2024

*Latest File Date: 05/31/2025

*Drive Date: 08/31/2025

*Agency Reel Number: M9114

*Beginning File: ID # XXXXXX825

*Ending File: ID # XXXXXX037

Fiche Count: 170

Image Count:

Notes:

Legacy Tracking Number:

Legacy Notes:

Accessioned: ☐

Legal Holds:

Select All Remove All Legal Holds selected: 0 Selected Legal Holds

Page 1 | Jump to Page: Go

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
Legal Holds Hold Code Hold Name Hold Status Hold Type Authorized By Individual Released By Individual Search Clear (Rollover for Current Search) Switch						

Page 1 | Jump to Page: Go The search found 0 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
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Microfiche: Use 'Create' to Add Bundles

Save Options

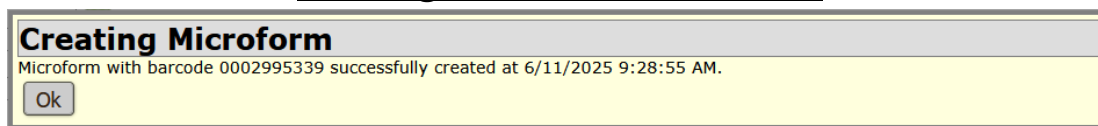


When the data fields are complete, the next step is to **Save** the information.

These options are located at the Create Microform screen's top right:

- **Cancel:** Click once to cancel the create process for this item. It will not be saved.
- **Set Defaults:** Do not click Set Defaults. Selecting this can compromise the Create process.
- **Save & Close:** Click once if:
 - selecting Save & New has been used for a set of items and the final item has been data entered.
- **OR**
 - Request Pickup is not going to be completed at this time. Search will need to be completed later to find the unrequested item to complete Request Pickup.
- **Save & View:** Click once if only one item is to be created and Request Pickup is ready to be completed.
- **Save & New:** Click once to create another item. For convenience, some fields will carry forward to eliminate repeated data entry. Fields carried forward are still editable. See **Save & Close** after data entering the final item.

Creating Microform information



If the above information does not appear, an error message appears at the top of the screen. Correct the error and click the original save option.

When the above screen appears, it includes the Microform Barcode that was generated for this microfilm reel. The barcode is the unique identification number applied to each item created in Gimmal. Click once on **Ok**. Then, if selected:

- **Save & Close:** The bundle is saved in Gimmal and the Microforms home page appears. Turn to **Request Pickup: Send/Return Items to the SRC** (Page 93) to have the bundle(s) picked up by the SRC.
- **Save & View:** The bundle is saved. View Microform is the screen to review the microfiche bundle just created. Turn to **Request Pickup: Send/Return Items to the SRC** (Page 93) to have the microfiche bundle picked up by the SRC.
- **Save & New:** The bundle is saved. Another Create a new Microform screen appears. Some fields carried forward from the previous bundle created but all fields are editable.

Microfiche: Use 'Create' to Add Bundles

NOTES

[illegible]

Microfiche: Use 'Create' to Add Bundles

NOTES

[illegible]

Microfiche: Use ‘Bulk Create’ to Add Bundles

Bulk Create is used to create several microfiche bundles all at once.

BOXYBIT *The bundles are created for the same Organization and the same Record Series. Data for the first bundle applies to the other bundles; the data fields for each bundle can be modified later.*

Some information about microforms

The Microforms item type tab is used for items identified as:

- **16mm Microfilm**
 - **16mm-2.5MIL***: 16 millimeter film with a thickness of 2.5 mil
 - **16mm-5MIL***: 16 millimeter film with a thickness of 5 mil
- **35mm Microfilm**
- **Microfiche**
(*1 mil = 0.001 of an inch)

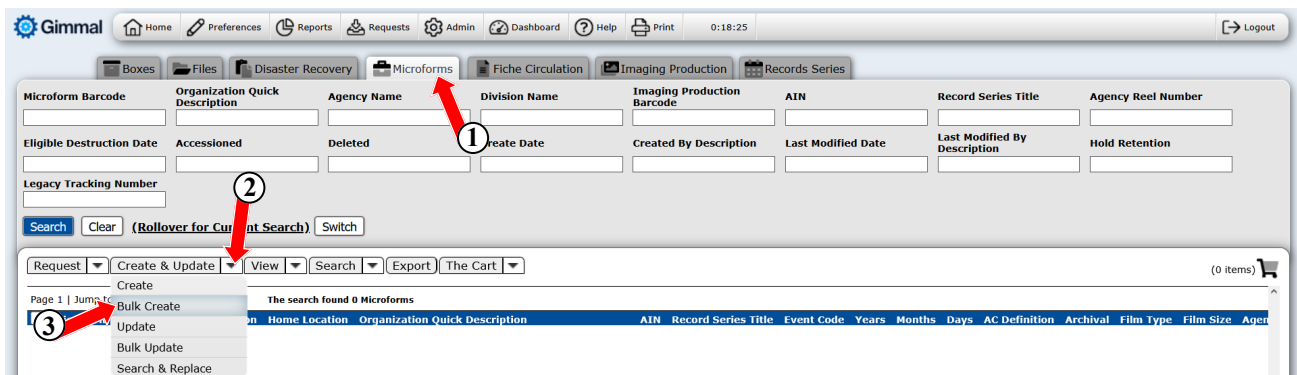
Bundle Microfiche Jackets

It is a good rule to bundle microfiche jackets before creating the items in Gimmal. A **jacket** is a single sheet of microfiche containing many images of microfilm sliced and inserted into microfiche jackets. A **bundle** is a small collection of microfiche jackets for the same Organization and Record Series Title that have been grouped together from a large amount of microfiche jackets.

- Group the microfiche jackets into bundles. It is a good way to get organized and this will help the SRC locate microfiche jackets or microfiche bundles when a delivery request is received.
- The bundles can be grouped into any amount but a good measure is to limit the bundles to no more than 200 microfiche jackets per microfiche bundle.
- When completing Gimmal data entry, each bundle is created as a separate container and the Fiche Count field is used to identify how many microfiche jackets are in that bundle.

BOXYBIT *It is recommended that the microfiche jackets be in protective microfiche envelopes, grouped by the title on the jackets. Envelopes look like small paper folders sealed on three sides and open at the top long edge. Please place a small piece of paper or index card at the start and end of each bundle so it is obvious where the bundle begins and ends. Do not use rubber bands.*

Bulk Create microfiche bundles



1. Click once on the **Microforms** item type tab.
2. Click once on **Create & Update** in the Action Buttons.
3. Click once on **Bulk Create** from the dropdown menu.

Bulk Create New Microforms screen

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Microfiche: Use 'Bulk Create' to Add Bundles

Number of items to create

Number of items to create:

Enter the number of microfilm reels to be created.

BOXYBIT At this point, continue the data entry by turning to **Microfiche: Use 'Create' to Add Bundles** (Page 75) and choose the Organization. *When data entry is complete, continue the process below then see Page 88 to save the data entry.*

Completed: Bulk Create New Microforms screen:

 Home Preferences Reports Requests Admin Dashboard Help Print 0:19:28 Logout

Bulk Create New Microforms Cancel Create Items

Fields marked with an * are required.
Number of items to create:

*Organization: Texas Big State Agency - 988 - East - -

Agency Name Division Name Business Unit Name Business Sub-Unit Name Organization Quick Description
Search Here:
Current Search: Find all Organization where Division Name Contains 'EAST'. Search Clear

Page 1 | Jump to Page: Go The search found 1 Item

Organization Quick Description
Texas Big State Agency - 988 - East - -

*Records Series: 53 - Contracts

Organization Quick Description AIN RSIN Record Series Title Event Code Years
Search Here:
Months Days AC Definition Remarks
Current Search: Find all Records Series where Record Series Title Contains 'CONTRACTS'. Search Clear

Page 1 | Jump to Page: Go The search found 2 Items

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Remarks
Texas Big State Agency - 988 - - -	25		Maintenance/Service Contracts	AC	15	6		AC=Latest contract date	
Texas Big State Agency - 988 - - -	53		Contracts	AC	20			AC=Termination of Contract	

Imaging Production: Add

Imaging Production Barcode Organization Quick Description Agency Name Division Name Contact Name
Search Here:
Current Search: There is no current Imaging Production query. To search Imaging Production, enter your criteria and click the Search button. Search Clear

*Film Type: Microfiche

*Film Size: Microfiche

*Earliest File Date: 03/01/2025

*Latest File Date: 05/31/2025

*Drive Date: 05/31/2025

*Agency Reel Number: Bundle 25

*Beginning File: Builder's Cap 17 Contract

*Ending File: Builder's Cap 84 Contract

Fiche Count: 193

Image Count:

Notes: History of contracts with Builder's Cap (5 Bundles of fiche)

Legacy Tracking Number:

Legacy Notes:

Accessioned: ☐

Legal Holds: Select All Remove All Legal Holds selected: 0 Selected Legal Holds

Page 1 | Jump to Page: Go

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
Legal Holds						
Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	
Search Clear (Rollover for Current Search) Switch						
Page 1 Jump to Page: Go The search found 0 Legal Holds						
Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	

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Microfiche: Use 'Bulk Create' to Add Bundles

Save

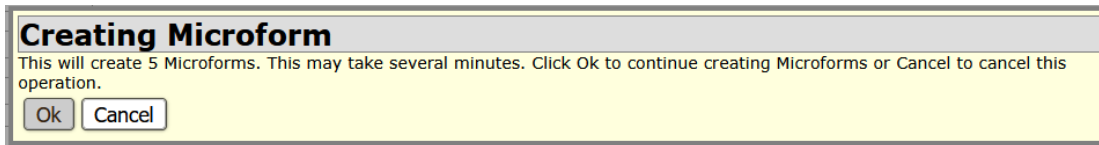


When data entry is complete, the next step is to **Save** the information.

The save option is located at the Bulk Create New Microforms screen's top right:

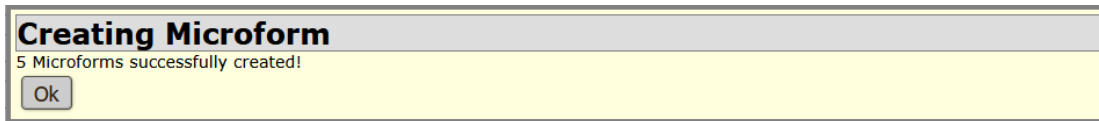
- **Cancel:** Click once to cancel the create process for these items. They will not be saved.
- **Create Items:** Click once to create the microfiche bundles.

Creating Microform information



If the above message does not appear telling how many bundles are to be created, an error message appears at the top of the screen. Correct the error and click the save option, again. Click once on **Ok**.

BOXYBIT *Do not click Ok more than once or Gimmal will duplicate the number of bundles being created. If duplicate bundles are created, send an email to gimmal@tsl.texas.gov and include a list of the microforms barcodes to be deleted. Do not send a screengrab image.*



When the above message appears, click once on **Ok**. Then, turn to ***Request Pickup: Send/Return Items to the SRC*** (Page 93) to have the microfiche bundles picked up by the SRC.

Microfiche: Use 'Bulk Create' to Add Bundles

NOTES

[illegible]

Microfiche: Use 'Bulk Create' to Add Bundles

NOTES

[illegible]

Microfilm or Microfiche: Do Not Use Records Series Tab to Add Items

View Records Series

View Records Series 35 - Legislative Files [Cancel]

View | Search | Export | The Cart

Legal Citations:

Vital: ☒

Confidentiality: Public

Approval Status: Approved

Item Approval Date:

Schedule Approval Date: 10/10/2023

Storage: ☐

Permanent: ☐

Notes:

Records Series (Boxes): 1 Box Query Boxes on Home Page Create a New Box for this Records Series

Page 1 | Jump to Page: [] Go

Box Quick Description	Current Location
0000829242 - 1	Location Masked

Records Series (Microforms): Query Microforms on Home Page Create a New Microform for this Records Series

Page 1 | Jump to Page: [] Go

Microform Quick Description	Current Location	Home Location
-----------------------------	------------------	---------------

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The functionality for creating items on from the Records Series tab does not work. Please do not use this method to create items.

Microfilm or Microfiche: Do Not Use Records Series Tab to Add Items to the Microforms Tab

NOTES

[illegible]

Request Pickup: Send/Return Items to the SRC

BOXYBIT *Gimmal clients outside of Austin: Check with the agency's Records Management team to determine if Gimmal is used to Request Pickup since additional charges may apply.*

Request Pickup for boxes, files (return only), disaster recovery (please see **Disaster Recovery Vault After-Hours Access**, Page 51), microfilm reels, and microfiche bundles* is done the same way for each medium but there are two ways to complete the Request Items to be picked up screen depending upon if new items are being sent to the SRC for the first time or if delivered items are being returned to the SRC.

- From the **View Box** (or whatever view tab) screen immediately after clicking **Save & View** from the single item's Create screen — continue below with **After clicking Save & View**.
BOXYBIT *A file can be returned to the SRC, it cannot be sent to the SRC as a new storage item to be placed into a box it has not been previously. For new file storage, request the box for delivery to add a file to a box that is at the SRC. Please see **Files: Create** (Page 43).*
- By using **Search** (turn to Page 94 of this section); this is done:
 - to **return** files, boxes, disaster recovery, or microforms (reels of microfilm and complete microfiche bundles*) previously in storage at the SRC.
 - to **request new item pickup** for any number of boxes, disaster recovery containers, or microforms at any point after they have been saved in Gimmal and are being sent to the SRC for the first time.

BOXYBIT **For microfiche returns to the SRC delivered as Fiche Circulation, please see **Request Pickup: Fiche Circulation: Return Microfiche Jackets to the SRC** (Page 101).*

After clicking Save & View

The screenshot shows the Gimmal application interface. At the top is a navigation bar with icons for Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. The 'Requests' icon is highlighted. Below the navigation bar is a header for the 'View Box' screen, showing the item ID 'J02995326 - 1' and a 'Cancel' button. The main content area has a tabbed interface with 'Request', 'Create & Update', 'View', 'Search', 'Export', and 'The Cart'. The 'Request' tab is selected, displaying a 'Pickup to SRC' button and a 'Delivery from' dropdown menu. Below these, the 'Organization' is set to 'Texas Big State Agency - 988'. Other fields include 'Organization', 'Agency Name', 'Division Name', 'Business Unit Name', 'Sub Business Unit Name', and 'TSLAC Analyst: zINACTIVE Sarah Jacobson'. At the bottom, there is a 'Records Series Information' section showing '54 - Computer Inventory / Telephone Records'.

After an item is created using **Save & View** and **Ok** has been clicked in the barcode dialogue box, **View Box** (or Disaster Recovery, or Microform) is the next screen. This is where information can be reviewed for the item that has been created in Gimmal.

To begin the Request Pickup process:

1. Click once on **Request**.
2. Click once on **Pickup to SRC**.

Turn to **Request Pickup** screen (Page 96).

Request Pickup: Send/Return Items to the SRC

Use Search

The screenshot shows the Gimmal application interface. The top navigation bar includes Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. The main content area has tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The 'Boxes' tab is selected. Below the tabs, there are several search fields: Box Barcode, Organization Quick Description, AIN, Record Series Title, Box Size, Agency Box #, Eligible Destruction Date, and Accessioned. There are also fields for Deleted, Create Date, Created Description, Last Modified Date, Last Modified By Description, Hold Retention, and Legacy Tracking #. A 'Search' button is located below these fields. A dropdown menu is open, showing options: Search Fields, Keyword, Duplicate, and Query. The 'Search Fields' option is highlighted.

1. Click once on the item type tab to **Search** (in this example, the Boxes tab).
2. Enter search terms into any **Quick Search** field(s) to find the item or items.
3. Click once on **Search** (continue on Page 95, **Search results**, if information shows in the home page grid).
- OR
4. Click once on **Search**.
5. Click once on **Search Fields** and continue below.

Search Boxes (or whatever tab selected)

The screenshot shows the 'Search for Boxes' dialog box. It has a title bar with 'Cancel' and 'Execute' buttons. The main content area is divided into two sections: 'Organization' and 'Records Series'. The 'Organization' section has fields for Agency Name, Division Name, Business Unit Name, Business Sub-Unit Name, and Organization Quick Description. The 'Records Series' section has fields for Organization Quick Description, AIN, RSIN, Record Series Title, Event Code, and Years. There are also fields for Months, Days, AC Definition, and Remarks. A 'Search' button is located at the bottom right of the dialog box.

Enter search information into any field(s) (including the **Gimmal System Fields** on the bottom half of the screen) to find the item(s) to request pickup. Click once on **Execute**.

Request Pickup: Send/Return Items to the SRC

Search results

Box Barcode Organization Quick Description AIN Record Series Title Box Size Agency Box Number Eligible Destruction Date Accessioned

Deleted Create Date Created By Description Last Modified Date Last Modified By Description Hold Retention Legacy Tracking Number

Search Clear (Rollover for Current Search) Switch

Request Create & Update View Search Export The Cart (0 items)

Page 1 | Jump to Page: 50 The search found 14 Boxes

Box Barcode	Current Location	Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	Agency
☐ 0002995326	Johnny Agency	Texas Big State Agency - 988 - - -	54	Computer Inventory / Telephone Records	AC	40			AC=Computer Install date or phone billing date		RC	1
☐ 92139	Location Masked	Texas Big State Agency - 988 - West - -	54	Computer Inventory / Telephone Records	AC	40			AC=Computer Install date or phone billing date		RC	2-20
☐ 0001192138	Location Masked	Texas Big State Agency - 988 - West - -	54	Computer Inventory / Telephone Records	AC	40			AC=Computer Install date or phone billing date		RC	1-20
☐ 0001192136	Location Masked	Texas Big State Agency - 988 - North - -	54	Computer Inventory / Telephone Records	AC	40			AC=Computer Install date or phone billing date		RC	Seco
☐ 0001192135	Location Masked	Texas Big State Agency - 988 - North - -	54	Computer Inventory / Telephone Records	AC	40			AC=Computer Install date or phone billing date		RC	First

Regardless of the Search method used from Page 94, the above screen is the next destination.

Click the checkbox (1) for the container(s) to request pickup for any items assigned to an agency employee. The **Current Location** column (2) tells which items are assigned to someone at the agency. If **Location Masked** is seen (3) in Current Location, that indicates the item is already at the SRC; do not select it. Click the checkbox (4) on the left of the column headers ribbon to select all* items (this selects only the items on the current page, if there are items on additional pages, they are not selected). The number of pages (5) shows how many home page grid pages show the search results.

** A setting in Preferences could limit the number of items that appear on a single screen page. Clicking the Select All checkbox selects the items on this single page, not the items on every page (if there is more than one page noted above the column headers ribbon). To increase/decrease the number of items (up to 500 per page) viewable on a single home page grid, please see Supplemental Information: Preferences: Number of items on home page (Page 175).*

Select Pickup to SRC

Box Barcode Organization Quick Description AIN Record Series Title Box Size Agency Box Number Eligible Destruction Date Accessioned

Deleted Create Date Created By Description Last Modified Date Last Modified By Description Hold Retention Legacy Tracking Number

Search Clear (Rollover for Current Search) Switch

Request Create & Update View Search Export The Cart (0 items)

Pickup to SRC

Delivery from SRC

Box Barcode	Current Location	Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	Agency
☒ 0002995326	Johnny Agency	Texas Big State Agency - 988 - - -	54	Computer Inventory / Telephone Records	AC	40			AC=Computer Install date or phone billing date		RC	1
☐ 0001192139	Location Masked	Texas Big State Agency - 988 - West - -	54	Computer Inventory / Telephone Records	AC	40			AC=Computer Install date or phone billing date		RC	2-20
☐ 0001192138	Location Masked	Texas Big State Agency - 988 - West - -	54	Computer Inventory / Telephone Records	AC	40			AC=Computer Install date or phone billing date		RC	1-20

After clicking the appropriate checkbox(es) for the item(s) to be picked up from the agency:

1. Click once on **Request**.
2. Click once on **Pickup to SRC**.

Request Pickup: Send/Return Items to the SRC

Request Pickup screen

Request Pickup

Page 1 | Jump to Page: Go

Update	Record Description	Current Location	Home Location (1)	Destination (2)
Remove Apply	0002995326 - 1	Johnny Agency	Location Masked	Location Masked

Enter, scan, or click the Search button to specify a location, then click Apply to set the destination for checked rows above:

Individuals

Individuals Barcode User Name First Name Last Name Address Email

Role

(Rollover for Current Search) (Rows Hidden)

Page 1 | Jump to Page: Go The search found 0 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
---------------------	-----------	------------	-----------	---------	-------	------

Recent Transfer Destinations

Item Description	Item Barcode	Tab
Select Jane Division	0000774386	

Comments:

Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request

Is this request for first time storage or to return item(s) to the SRC?

Send items to the SRC for the first time (above image):

The screen looks similar to the above illustration for items being sent to the SRC for the first time. **Location Masked** shows in the **Home Location** column (1) and **Destination** column (2). There is no State Records Center barcode label on the item(s).

Return items to the SRC (below image):

The screen looks similar to the below illustration for items being returned to the SRC. The **Home Location** column (3) shows **Location Masked** that prevents anyone without the proper permission from seeing the exact location within the SRC where the item was located. The **Destination** column (4) shows 0000085998 the SRC barcode number. There is a State Records Center barcode label on the item(s).

Request Pickup

Page 1 | Jump to Page: Go

Update	Record Description	Current Location	Home Location (3)	Destination (4)
Remove Apply	0000866701 - 1	Jane Division	Location Masked	0000085998

Enter, scan, or click the Search button to specify a location, then click Apply to set the destination for checked rows above:

Individuals

Individuals Barcode User Name First Name Last Name Address Email

Role

(Rollover for Current Search) (Rows Hidden)

Page 1 | Jump to Page: Go The search found 0 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
---------------------	-----------	------------	-----------	---------	-------	------

Recent Transfer Destinations

Item Description	Item Barcode	Tab
Select Jane Division	0000774386	

Comments:

Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request

BOXYBIT Since the intent of sending items to the SRC is the same for both of the above examples, the first illustration is what is used for the remainder of this section.

Request Pickup: Send/Return Items to the SRC

Sections on Request Pickup screen

The screenshot shows the 'Request Pickup' interface in the Gimmal system. It includes a navigation bar at the top with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. The main area is titled 'Request Pickup' and contains several sections:

- Page Information:** A header bar with 'Page 1 | Jump to Page: [] Go' and a 'Cancel' button.
- Table:** A table with columns: Update, Record Description, Current Location, Home Location, and Destination. It shows a single row with a record description '0002995326 - 1', current location 'Johnny Agency', and home location 'Location Masked'. There are 'Remove' and 'Apply' buttons in the 'Update' column.
- Search Section:** A section with a search bar and a 'Search' button. Below it, there are tabs for 'Individuals' and 'Recent Transfer Destinations'.
- Individuals Tab:** A form with fields for 'Individuals Barcode', 'User Name', 'First Name', 'Last Name', 'Address', and 'Email'. There is a 'Role' dropdown and a 'Search' button.
- Recent Transfer Destinations:** A table with columns: Item Description, Item Barcode, and Tab. It shows a single row with 'Jane Division' and '0000774386'.
- Comments:** A text area for entering comments.

Numbered callouts (1-11) point to specific elements: 1. Page Information; 2. Change Destination (APPLY buttons); 3. Record Description; 4. Current Location; 5. Home Location; 6. Destination; 7. Individuals tab; 8. Recent Request Destinations; 9. Comments; 10. Cancel button; 11. Request button.

Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request

- Page Information:** This displays the number of screen pages for the pickup item(s). The maximum is 10 items per page. All items on all pages will be processed with this request.
- Change Destination:** APPLY buttons are not used. **Disregard these buttons.**
- Record Description:** The item barcode and the container number.
- Current Location:** The Current Location defaults to the person who created the new item(s) in Gimmal or to the person who received the item(s) as a delivery from the SRC.
- Home Location:** The Home Location is the same for new item(s) to be stored at the SRC for the first time and for items being returned (please see Page 96).
New SRC storage item(s): Location Masked is shown to hide secure information.
- Destination:** The Destination depends upon if this is a pickup for item(s) to be sent to the SRC for the first time, or if this is a pickup to return item(s) to the SRC (please see Page 96).
Item(s) to be returned to the SRC: Location Masked is shown to hide secure information.
- Individuals tab:** This function is not used for pickup items. **Disregard the Individuals tab.**
- Recent Request Destinations:** If information is listed here, do not click any of the Select buttons from this field because the Destination for the items on this screen is going to be the SRC, not anyone listed in this area. **Disregard this area of the screen.**
- Comments:** Type **NEW ACCESSION** if this is a pickup request for an item that has not been stored at the SRC (no SRC label appears on the item). Also use this field to provide additional information for the SRC driver or if a specific pickup date is needed. **See Page 98 to use this field to have the item(s) picked up from someone else.**
Rush Pickup: For a Rush pickup (10 items or less), enter RUSH PICKUP in this field then call the SRC Circulation Desk 512-475-5155 after the request is submitted to let the SRC know a Rush Pickup is in the system. The request deadline for same-day Rush Pick Up is 2p.m. This incurs additional fees. *For fees, please see the Storage Fee Schedule and Imaging-Digital Fee Schedule: <https://www.tsl.texas.gov/slr/storage>*
To take item(s) to the SRC: If the item(s) will be taken to the SRC by an agency employee instead of having the SRC driver make the pickup, include a note about this in the Comments field and call the SRC Circulation Desk 512-475-5155 to make the arrangement.
- Cancel button:** Click once to cancel this request and return to the home page.
- Request button:** Click once on **Request Pickup** when this screen is complete.

Request Pickup: Send/Return Items to the SRC

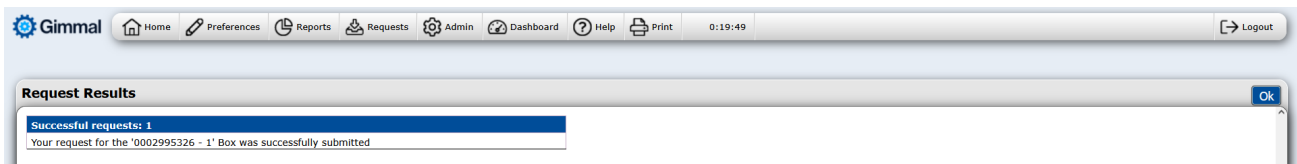
Modify the pickup location and other uses for Comments

Comments:

If the pickup location is not the person listed as the Current Location, enter the other contact person's name, location at the agency, and phone number in the **Comments** field. Include any additional information that may assist the driver from the SRC. This is also where information can be included if a pickup date needs to be requested (like for Disaster Recovery). If an employee at the Texas Big State Agency named Johnny Agency is making the request for a new box, but wants to change the pickup location at the agency to coworker Jane Division, this is how the Comments field is completed:

Comments: NEW ACCESSION -- please pick up from Jane Division, Office 1289, 512-555-5160. Ring bell on the Loading Dock entrance.

Request Results



This list details what was just submitted to be picked up at the agency. The Request Pickup process is complete. Click once on **Ok** to return to the home page grid.

To review requests submitted, click **Requests** at the top of the screen then click the link for tab for the request. This is user specific, requests submitted by other users are not seen.

To cancel any Request, call the SRC Circulation Desk: 512-475-5155.

Request Pickup: Send/Return Items to the SRC

NOTES

[illegible]

Request Pickup: Send/Return Items to the SRC

NOTES

[illegible]

Request Pickup: Fiche Circulation: Return Microfiche Jackets to the SRC

BOXYBIT *Gimmal clients outside of Austin: Check with the agency's Records Management team to determine if Gimmal is used to Request Pickup since additional charges may apply.*

The process to Request Pickup for individual microfiche jackets (not a complete microfiche bundle) that were delivered as Fiche Circulation is similar to returning most items to the SRC. From the **Fiche Circulation** tab's home page, perform a **Search** to find the microfiche jackets to return to the SRC.

BOXYBIT *This section is used only for Microfiche jackets that were delivered as part of a bundle stored at the SRC. For microfiche jacket returns to the SRC that were delivered as a complete bundle, please see the section **Request Pickup: Send/Return Items to the SRC** (Page 93).*

Use Search

The screenshot shows the Gimmal application interface. The 'Fiche Circulation' tab is selected. The search form includes fields for 'Fiche Circulation Barcode', 'Organization', 'Number of Pulls', 'Number of Fiche Pulled', 'Fiche Title(s) to Pull (separated by //)', 'Deleted', 'Create Date', and 'Created By Description'. The 'Search' button is highlighted with a red arrow and the number 3. The 'Search Fields' dropdown menu is open, showing options like 'Keyword', 'Duplicate', and 'Query', with a red arrow and the number 5 pointing to it. The 'Fiche Title(s) to Pull' field is highlighted with a red arrow and the number 2. The 'Fiche Circulation' tab is highlighted with a red arrow and the number 1. The 'Search' button is highlighted with a red arrow and the number 4.

1. Click once on the **Fiche Circulation** item type tab.
2. Enter search terms into any of the **Quick Search** fields to find the Fiche Circulation that was created to deliver the fiche item(s).

BOXYBIT *The **Fiche Circulation Barcode** is found on the delivery envelope for the microfiche item(s) delivered to the agency.*

3. Click once on **Search** (continue on Page 102, **Search Results**, if information shows in the home page grid).

OR

4. Click once on **Search**.
5. Click once on **Search Fields** (continue on Page 102, **Search Fiche Circulation**).

Request Pickup: Fiche Circulation: Return Microfiche Jackets to the SRC

Search Fiche Circulation

Search for Fiche Circulation

Organization Quick Description:

Agency Name: _____ Division Name: _____ Business Unit Name: _____ Business Sub-Unit Name: _____ Organization Quick Description: _____

Search Here: _____

Current Search: _____ Search Clear

Number of Pulls: _____

Number of Fiche Pulled: _____

Fiche Title(s) to Pull (separated by //): _____

Locked Down: _____

Gimmal System Fields

Fiche Circulation Barcode: _____

Current Location: _____ Search

Current Location Item Type ID: _____

Cancel Execute

Enter search information into any fields (including the **Gimmal System Fields** at the bottom half of the screen) to find the microfiche jackets that were delivered. Click once on **Execute**.

Search results

Search results

Fiche Circulation Barcode: 0000866115

Organization: Johnny Agency

Number of Pulls: 1

Number of Fiche Pulled: 2

Fiche Title(s) to Pull (separated by //): Fisher

Deleted: _____

Create Date: _____

Created By Description: _____

Search Clear (Rollover for Current Search) Switch

Request Create & Update View Search Export The Cart

Page 1 of 1 Go

The search found 1 Fiche Circulation

Fiche Circulation Barcode	Current Location	Organization	Number of Pulls	Number of Fiche Pulled	Fiche Title(s) to Pull (separated by //)
0000866115	Johnny Agency	Texas Big State Agency - 988 - Central - -	1	2	Fisher

Regardless of the Search method used from Page 101, the above illustration is the next screen. The search result for Fiche Circulation item(s) populate the home page grid. The **Current Location** column (1) shows the individual at the agency assigned to the item(s). In this example **Fiche Circulation Barcode** 0000866115 (2) is assigned to Johnny Agency. The **Fiche Title(s) to Pull (separated by //)** column (3) details the microfiche jacket(s) title bar information. Click the checkbox (4) for the microfiche jacket(s) that need to be returned to the SRC.

Select Pickup to SRC

Select Pickup to SRC

Fiche Circulation Barcode: 0000866115

Organization: Johnny Agency

Number of Pulls: 1

Number of Fiche Pulled: 2

Fiche Title(s) to Pull (separated by //): Fisher

Deleted: _____

Create Date: _____

Created By Description: _____

Search Clear (Rollover for Current Search) Switch

Request Create & Update View Search Export The Cart

Pickup to SRC

Delivery from SRC

Fiche Circulation Barcode	Current Location	Organization	Number of Pulls	Number of Fiche Pulled	Fiche Title(s) to Pull (separated by //)
0000866115	Johnny Agency	Texas Big State Agency - 988 - Central - -	1	2	Fisher

After selecting the Fiche Circulation(s) to return to the SRC, click once (1) on **Request** then click once (2) on **Pickup to SRC**.

Request Pickup: Fiche Circulation: Return Microfiche Jackets to the SRC

Sections on Request Pickup screen

The screenshot shows the 'Request Pickup' interface. At the top, there's a navigation bar with 'Gimmal' logo and links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. The main area is titled 'Request Pickup' and contains a table with the following data:

Update	Record Description	Current Location	Home Location	Destination
Remove [Apply]	0000866115 - Fisher	Johnny Agency	0000777495 - 32	0000777495 - 32

Below the table, there are tabs for 'Individuals' and 'Microforms'. The 'Individuals' tab is active, showing a search form with fields for User Name, First Name, Last Name, Address, and Email. A 'Search' button is present. Below the search form, it says 'The search found 0 Individuals'. At the bottom, there's a 'Recent Transfer Destinations' section with a table showing 'Jane Division' and '0000774386'. A 'Comments' field is at the very bottom.

- Page Information:** This displays how many screen pages the requested pickup items appear. The maximum is 10 items per page. All items on all pages will be processed with this request.
- Change Destination:** APPLY buttons are not used. **Disregard these buttons.**
- Record Description:** The item barcode and the container number.
- Current Location:** The Current Location defaults to the person who created the new item(s) in Gimmal or to the person who received the item(s) as a delivery from the SRC.
- Home Location:** The barcode for the microfiche bundle 0000777495 - 32 at the SRC where the fiche pulled is shown as the Home Location.
- Destination:** The barcode for the microfiche bundle 0000777495 - 32 at the SRC where the fiche pulled is shown as the Destination.
- Individuals/Microforms tabs:** This function is not used for pickup items. **Disregard the Individuals/Microforms tabs.**
- Recent Request Destinations:** If information is listed here, do not click any of the Select buttons from this field because the Destination for the items on this screen is going to be the microfiche bundle from where the fiche was (or were) pulled for delivery, not anyone listed in this area. **Disregard this area of the screen.**
- Comments:** Use this field to provide additional information for the SRC driver or if a specific pickup date is needed. **See Page 104 to use this field to have the item(s) picked up from someone else.**
 - Rush Pickup:** For a Rush pickup (10 items or less), enter RUSH PICKUP in this field then call the SRC Circulation Desk 512-475-5155 after the request is submitted to let the SRC know a Rush Pickup is in the system. The request deadline for same-day Rush Pick Up is 2p.m. This incurs additional fees. *For fees, please see the Storage Fee Schedule and Imaging-Digital Fee Schedule: <https://www.tsl.texas.gov/slr/storage>*
 - To take item(s) to the SRC:** If the item(s) will be taken to the SRC by an agency employee instead of having the SRC driver make the pickup, include a note about this in the Comments field and call the SRC Circulation Desk 512-475-5155 to make the arrangement.
- Cancel button:** Click once to cancel this request and return to the home page.
- Request Pickup button:** Click once on **Request Pickup** when this screen is complete.

Request Pickup: Fiche Circulation: Return Microfiche Jackets to the SRC

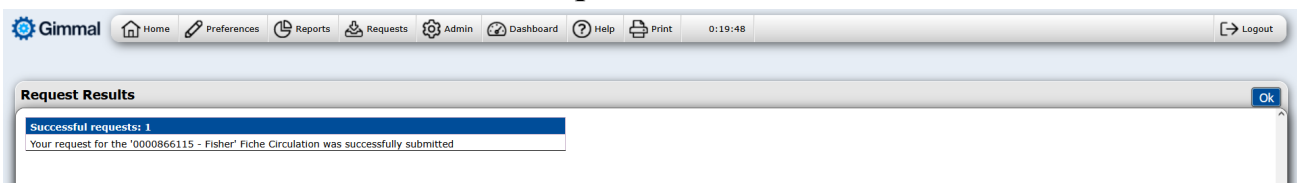
Modify the pickup location and other uses for Comments

Comments:

If the pickup location is not the person listed as the Current Location, enter the other contact person's name, location at the agency, and phone number in the **Comments** field. Include any additional information that may assist the driver from the SRC. This is also where information can be included if a pickup date needs to be requested. If an employee at the Texas Big State Agency named Johnny Agency is making the request for a new box, but wants to change the pickup location at the agency to coworker Roman O. Manager, this is how the Comments field is completed:

Comments:

Request Results



This details what was just submitted to be picked up at the agency.

The Request Pickup process is complete. Click once on **Ok** to return to the home page grid.

To review Fiche Circulation requests submitted, click **Requests** at the top of the screen then click the link for Fiche Circulation Requests. This is user specific, requests submitted by other users are not seen.

To cancel any Request, call the SRC Circulation Desk: 512-475-5155.

Request Pickup: Fiche Circulation: Return Microfiche Jackets to the SRC

NOTES

[illegible]

Request Pickup: Fiche Circulation: Return Microfiche Jackets to the SRC

NOTES

[illegible]

BOXYBIT *Gimmal clients outside of Austin: Check with the agency's Records Management team to determine if Gimmal is used to Request Delivery since additional charges may apply.*

BOXYBIT While the process is similar for all tabs where information in Gimmel appears, the Boxes tab is used in this section's illustrations.

The screenshot shows the Gimbal Records Series page. At the top is a navigation bar with links: Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and a Logout button. Below this is a sub-navigation bar with tabs: Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The main content area is divided into two sections. The top section is a form for creating or updating a record series, with fields for Box Barcode, Organization Quick Description, AIN, Record Series Title, Box Size, Agency Box #, Eligible Destruction Date, and Accessioned. The bottom section is a search and filter area, with a Search button, a Clear button, and a (Rollover for Current Search) button. Below the search area is a table of records with columns: AIN, Record Series Title, Event Code, Years, Months, Days, AC Definition, Archival, Box Size, Agency Box #, Earliest File Date, and Latest File Date. Red arrows and numbered callouts (1-5) highlight specific features: 1 points to the Organization Quick Description field, 2 points to the Accessioned field, 3 points to the Search button, 4 points to the Search dropdown menu, and 5 points to the Search Fields dropdown menu.

Navigation: Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, 0:19:12, Logout

Tabs: Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, Records Series

Form Fields:

- Box Barcode
- Organization Quick Description
- AIN
- Record Series Title
- Box Size
- Agency Box #
- Eligible Destruction Date
- Accessioned
- Deleted
- Create Date
- Created
- Description
- Last Modified Date
- Last Modified By Description
- Hold Retention
- Legacy Tracking #

Buttons: Search, Clear, (Rollover for Current Search), Switch

Search and Filter:

- Request
- Create & Update
- View
- Search
- Export
- The Cart

Page 1 | Jump to Page: Go

Search Fields:

- Box Barcode
- Current Location
- Organization
- Keyword
- Duplicate
- Query

Table Headers:

- AIN
- Record Series Title
- Event Code
- Years
- Months
- Days
- AC Definition
- Archival
- Box Size
- Agency Box #
- Earliest File Date
- Latest File Date

1. Click once on the appropriate **item type tab** to search.
2. Enter search terms into any of the **Quick Search** fields to find the item at the SRC.
3. Click once on **Search**. If results populate in the grid, continue to **Search Results** (Page 108).

OR

4. Click once on **Search**.
5. Click once on **Search Fields** and continue to **Search Boxes (or whatever tab selected)** (Page 108).

Request Delivery from the SRC: Boxes, Disaster Recovery, Microfilm Reels, and Microfiche Bundles

Search Boxes (or whatever tab selected)

Organization:

Search Here: Agency Name Division Name Business Unit Name Business Sub-Unit Name Organization Quick Description

Current Search: Search Clear

Organization :
Agency Name:
Division Name:
Business Unit Name:
Sub Business Unit Name:
TSLAC Analyst:

Records Series:

Search Here: Organization Quick Description AIN RSIN Record Series Title Event Code Years

Current Search: Months Days AC Definition Remarks Search Clear

Enter search information into any fields (including the **Gimmal System Fields** at the bottom half of the screen) to find item(s) to request delivery. Click once on **Execute**.

Search results

Box Barcode Organization Quick Description AIN Record Series Title Box Size Agency Box # Eligible Destruction Date Accessioned

Deleted Create Date Created By Description Last Modified Date Last Modified By Description Hold Retention Legacy Tracking #

Search Clear (Rollover for 2 ent Search) Switch

Page 1 | Jump to Page: Go The search found 2 Boxes

Box Barcode	Current Location	Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	Agency Box
☐	Johnny Agency	Texas Big State Agency - 988 - West - -	38	Transmittals - Original	AC	3			AC=Latest page date	A	RC	1
☐	Location Masked	Texas Big State Agency - 988 - West - -	38	Transmittals - Original	AC	3			AC=Latest page date	A	RC	2

Regardless of the Search method used from Page 107, the above screen is the next destination.

Click the checkbox **(1)** for the container(s) to request delivery. The **Current Location (2)** tells which items are assigned to someone at the agency. If **Location Masked** is seen **(3)** in the Current Location, that indicates the item is at the SRC and is available for delivery. Click the checkbox **(4)** on the left of the column headers ribbon to select all* of the items (this selects only the items on the current page being viewed, if there are items on additional pages, they are not selected). The number of pages **(5)** shows how many home page grid pages show the search results.

BOXYBIT *A setting in Preferences could limit the number of items that appear on a single screen page. Clicking the Select All checkbox selects the items on this single page, not the items on every page (if there is more than one page noted above the column headers ribbon). To increase/decrease the number of items (up to 500 per page) viewable on a single home page grid, please see **Supplemental Information: Preferences: Number of items on home page (Page 175)**.

Request Delivery from the SRC: Boxes, Disaster Recovery, Microfilm Reels, and Microfiche Bundles

Select Delivery from SRC

The screenshot shows the Gimmal interface for selecting delivery from the SRC. At the top, there's a navigation bar with 'Gimmal' logo and links to Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. Below this is a tabbed interface with 'Boxes', 'Files', 'Disaster Recovery', 'Microforms', 'Fiche Circulation', 'Imaging Production', and 'Records Series'. The 'Boxes' tab is active. The main area contains a search form with fields for Box Barcode, Organization Quick Description, AIN, Record Series Title, Box Size, Agency Box #, Eligible Destruction Date, and Accessioned. Below these are fields for Deleted, Create Date, Created By Description, Last Modified Date, Last Modified By Description, Hold Retention, and Legacy Tracking #. A 'Search' button is present. Below the search form is a table of results. The first row is highlighted. Red arrows and numbers 1 and 2 point to the 'Request' dropdown and the 'Delivery from SRC' checkbox respectively.

After clicking the appropriate checkbox(es) for the item(s) to be delivered:

1. Click once on **Request**.
2. Click once on **Delivery from SRC**.

Sections on Request Items screen

The screenshot shows the Gimmal 'Request Items' screen. At the top, there's a navigation bar with 'Gimmal' logo and links to Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. Below this is a tabbed interface with 'Request Items' selected. The main area contains a form for requesting items. Red circles and numbers 1 through 10 highlight specific sections and fields: 1. Page Information (Page 1 | Jump to Page:), 2. Record Description (0002565769 - 2), 3. Delivery Destination (Johnny Agency), 4. Individuals section, 5. Recent Transfer Destinations table, 6. Comments field, 7. Alternate Fulfillment Method dropdown, 8. Cancel button, 9. Request button, and 10. Off-site Vendor field.

1. **Page Information:** Tells the number of request pages. There are 10 requests per request page. All requests will be submitted together.
2. **Record Description:** The item(s) selected on the previous screen.
3. **Delivery Destination:** The person who receives the delivery item(s). **Disregard Enter, scan, or click the Search button to specify the desired destination. This is a Gimmal textual error.**
BOXYBIT If the person who is to receive the item(s) is someone other than the person listed here, use the **Individuals** section (4) and see Page 110, **Change the delivery destination**.
5. **Recent Transfer Destinations:** Please see **Change the delivery destination** (Page 110).
6. **Comments:** This field can be used to provide information to assist the SRC driver who is delivering the item(s) or if a specific delivery date is needed (like for Disaster Recovery).
7. **Alternate Fulfillment Method:** Uses include **Permanent Withdrawal, Rush Delivery, Scan On Demand (Files and Microforms only), or View or Receive Item at SRC**.
BOXYBIT Please see **Alternate Fulfillment Method** (Page 111).
8. **Cancel button:** Click once to cancel this request and return to the home page.
9. **Request button:** Click once when information on this screen is complete.
10. **Off-site Vendor:** This is a standard field in the system; the SRC does not use this field.

Change the delivery destination

Recent Transfer Destinations

Johnny Agency

0000774385



Sometimes, a coworker other than the person named here is to be the delivery destination. In the above illustration, Johnny Agency is the **delivery destination**. To change the delivery destination for the box, use the **Recent Transfer Destinations** section if the person is listed.

BOXYBIT If the person is listed in *Recent Transfer Destinations*:

Recent Transfer Destinations

	Item Description	Item Barcode	Tab
Select	Jane Division	0000774386	

Click once on **Select** and continue to Page 111.

Individuals tab

Johnny Agency

0000774385



Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email
		DUSTY	BOX-LID		
Role					
Search Clear (Rollover for Current Search) (Rows Hidden) Switch					

Page 1 | Jump to Page:

Go

 The search found 0 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
---------------------	-----------	------------	-----------	---------	-------	------

To use the **Individuals** tab to search for the individual at the agency who is going to be the delivery destination, enter information for that person in any of the **Quick Search** fields to find that person and click once on **Search**.

Data Example: Dusty (in First Name) Box-Lid (in Last Name)

Johnny Agency

0000774385



Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email
		DUSTY	BOX-LID		
Role					
Search Clear (Rollover for Current Search) (Rows Hidden) Switch					

Page 1 | Jump to Page:

Go

 The search found 1 Individual

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
☒ 0000990129	Dusty.Box-Lid	Dusty	Box-Lid	The Big State Building, 200 Big State Highway, Austin, TX 78756	Dusty.Box-Lid@tbsa.texas.gov	Assignee

When a search result appears, click once on the radio button to the left of the person who is to be assigned as the delivery destination for this delivery request.

BOXYBIT If the person who is to be the delivery destination cannot be found in Gimmel, contact the agency's Records Management team to get that person added to Gimmel.

Change the delivery destination (continued)

Dusty Box-Lid 

0000990129 

 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email
		DUSTY	BOX-LID		

Role

(Rollover for Current Search) (Rows Hidden)

Page 1 | Jump to Page: The search found 1 Individual

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
☒ 0000990129	Dusty.Box-Lid	Dusty	Box-Lid	The Big State Building, 200 Big State Highway, Austin, TX 78756	Dusty.Box-Lid@tbsa.texas.gov	Assignee

When Johnny Agency selected Dusty Box-Lid as the delivery destination, Dusty's name replaced Johnny's name as the delivery destination.

Alternate Fulfillment Method

Alternate Fulfillment Method:

- Permanent Withdrawal
- Rush Delivery
- Scan On Demand (Files and Microforms only)
- View or Receive Item(s) at SRC

There are several options here (leave this field empty if this is a standard delivery):

- **Permanent Withdrawal:** Select this if the item (box, microfilm reel, or complete microfiche bundle) is never to be returned to the SRC. **Permanent Withdrawal incurs an additional fee. For Disaster Recovery:** Permanent Withdrawal is not used for Disaster Recovery delivery.
- **Rush Delivery:** If this is a rush delivery (10 items or less), select this option. **Rush Delivery incurs additional fees. For fees, please see the Storage Fee Schedule and Imaging-Digital Fee Schedule:** <https://www.tsl.texas.gov/slr/storage>
BOXYBIT When selecting RUSH delivery, call the SRC Circulation Desk (512-475-5155) after submitting this request so that they are aware of this RUSH delivery; request deadline is 2 p.m. for same-day delivery.
- **Scan On Demand (Files and Microforms Only):** Please see **Supplemental Information: Scan On Demand for Delivery** (Page 193).
- **View or Receive Item(s) at SRC:** Select this to go to the SRC to view or receive the item(s) for delivery. Also use the comments field to provide contact information and when the item(s) should be ready.
BOXYBIT Microfilm and microfiche items can be given to the client at the SRC but they cannot be viewed on equipment at the SRC.

For more information about Alternate Fulfillment Method, please see **Supplemental Information: Alternate Fulfillment Method** (Page 177).

Review Request Items

Request Items

Page 1 | Jump to Page: Go

Record Description	Off-site Vendor
Remove	0002565769 - 2 (None)

Enter, scan, or click the Search button to specify the desired destination:
Dusty Box-Lid
0000990129

Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email
		DUSTY	BOX-LID		

Role

Search Clear (Rollover for Current Search) (Rows Hidden) Switch

Page 1 | Jump to Page: Go The search found 1 Individual

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
0000990129	Dusty.Box-Lid	Dusty	Box-Lid	The Big State Building, 200 Big State Highway, Austin, TX 78756	Dusty.Box-Lid@tbsa.texas.gov	Assignee

Recent Transfer Destinations

Item Description	Item Barcode	Tab
Select Jane Division	0000774386	

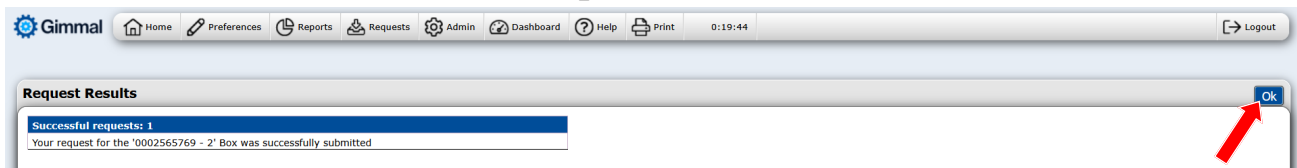
Comments:
Dusty's office is L213, phone is 512-555-4511, but Charlie can sign for the delivery at the front desk.

Alternate Fulfillment Method:

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Johnny Agency assigned Dusty Box-Lid (1) as the delivery destination for this item. The **Comments** field (2) includes Dusty's office location, office phone number, as well as an additional person who can sign for the delivery. Alternative Method field (3) was not used for this delivery request. When the screen is complete, click once (4) on **Request**.

Request Results



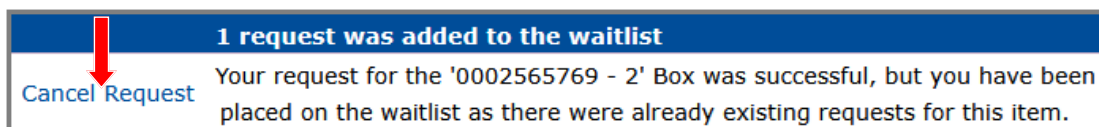
The Request Delivery was successfully submitted. The person assigned as the delivery destination will receive these items usually within one Monday-Friday workday for a regular (non-Rush) delivery of one to a few items. Larger deliveries may take several days. Please call the SRC Circulation Desk (512-475-5155) for delivery schedule information.

Click once on **Ok** to return to the home page grid for the item type tab from where this request was generated.

To review requests submitted, click **Requests** at the top of the screen then click the link for type of request tab. Reviewing requests is user specific, requests submitted by other users are not seen.

To cancel any Request, call the SRC Circulation Desk: 512-475-5155.

Waitlist

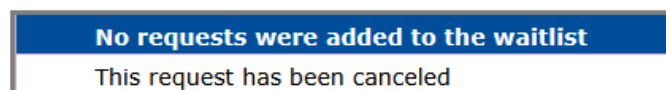


Waitlist means that someone else has already requested the item for delivery or it is assigned to someone else at the agency (not at its home location).

This delivery request will be processed to the delivery recipient when the item is returned to the SRC unless the request is canceled.

To cancel this Request, please click once on **Cancel** (noted above) and contact the SRC Circulation Desk (512-475-5155) so the SRC will know this request has been canceled. Otherwise, click **Home** to return to the home page not to cancel the request.

If this Waitlist delivery request is canceled, this confirmation will show:



Request Delivery from the SRC: Boxes, Disaster Recovery, Microfilm Reels, and Microfiche Bundles

NOTES

[illegible]

Request Delivery from the SRC: Files

BOXYBIT *Gimmal clients outside of Austin: Check with the agency's Records Management team to determine if Gimmal is used to Request Delivery since additional charges may apply.*

The process to request delivery for a file is to use the instruction in this section to look to the box in which the file is stored at the SRC. Good records management policy would be that someone at the agency has maintained a list of files for every box sent to the SRC. Feel free to search for the file on the files tab. If the file is not found on the files tab, instructions in this section will illustrate how to request files that do not appear in Gimmal. Information for the box where the file is stored at the SRC is required for this process. Please see *Supplemental Information: Scan On Demand for Delivery* (Page 193) to request files for electronic delivery to a work email address.

Find the box to request file delivery

The screenshot shows the Gimmal application interface. At the top, there's a navigation bar with tabs: Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. Below this is a sub-navigation bar with tabs: Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The 'Boxes' tab is selected. The main area contains a search form with various fields and a 'Search' button. A red arrow points to the 'Search' button. Another red arrow points to the 'Search Fields' dropdown menu. Below the search form is a table with columns: AIN, Record Series Title, Event Code, Years, Months, Days, AG Definition, Archival, Box Size, Agency Box Number, and Earliest File D. The table is currently empty, showing '(0 items)'.

To start the file request process in Gimmal, find the box on the Boxes tab by using one of two search methods:

1. Click once on the **Boxes** item type tab.
 2. Enter search terms into any of the **Quick Search** fields to find the box at the SRC.
 3. Click once on **Search**. If results populate in the grid, continue to **Search results** (Page 116).
- OR**
4. Click once on **Search**.
 5. Click once on **Search Fields** and continue below.

Search Boxes

The screenshot shows the 'Search for Boxes' dialog box in the Gimmal application. The dialog box has a title bar with the text 'Search for Boxes' and two buttons: 'Cancel' and 'Execute'. Below the title bar is a form with several fields. The 'Organization' field is at the top. Below it are fields for 'Agency Name', 'Division Name', 'Business Unit Name', 'Business Sub-Unit Name', and 'Organization Quick Description'. There are also fields for 'Search Here', 'Current Search', and 'Organization'. A red arrow points to the 'Execute' button.

Enter search information into any fields (including the **Gimmal System Fields** at the bottom half of the screen) to find item(s) to request delivery. Click once on **Execute**.

Request Delivery from the SRC: Files

Search results

Box Barcode: 000892625 or 0000892626
Organization Quick Description: Texas Big State Agency - 988 - East - -
AIN: 02
Record Series Title: Client Questionnaire
Box Size: 8
Agency Box Number: 101
Eligible Destruction Date: RC
Accessioned: 101

Deleted: []
Create Date: []
Created By Description: Johnny A.
Last Modified Date: []
Last Modified By Description: []
Hold Retention: 2
Legacy Tracking Number: 6

Search [] Clear [] (Rollover for Current Search) [] Switch []

Request [] Create & Update [] View [] Search [] Export [] The Cart []

Page 1 | Jump to Page: [] Go [] The search found 2 Boxes

Box Barcode	Current Location	Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	Agent
0000892625	Location Masked	Texas Big State Agency - 988 - East - -	02	Client Questionnaire		8					RC	101
0000892626	Johnny A.	Texas Big State Agency - 988 - North - -	03	Data Entry Form	US	2	6				RC	21.2..

Regardless of the Search method used from Page 115, the above illustration is the next screen. The **Current Location (1)** column tells which boxes are assigned to an employee at the agency. To request a file for delivery, the box must be at the SRC. Remember, boxes at the SRC have  **Location Masked** in the Current Location (2) column.

Look at the Contents column

Box Barcode: 000892625 or 0000892626
Organization Quick Description: Texas Big State Agency - 988 - East - -
AIN: 02
Record Series Title: Client Questionnaire
Box Size: 8
Agency Box Number: 101
Eligible Destruction Date: RC
Accessioned: 101

Deleted: []
Create Date: []
Created By Description: Johnny A.
Last Modified Date: []
Last Modified By Description: []
Hold Retention: 2
Legacy Tracking Number: 6

Search [] Clear [] (Rollover for Current Search) [] Switch []

Request [] Create & Update [] View [] Search [] Export [] The Cart []

Page 1 | Jump to Page: [] Go [] The search found 2 Boxes

Box Barcode	Legacy Tracking Number	Contents
0000892625	0000892625 - 101 contents:	11 Files (1 out) Show Create Run Contents Report Run Files Out Report Query Files with this Box Query all Files with 0000892625 - 101 as home location
0000892626	0000892626 - 21.2.4 contents:	0 Files Create

Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request

Scroll to the right (1) to see the **Contents** column (2).

File information

The file section will show information like one of these two examples:

0000892625 - 101 contents:

 11 Files (1 out) Show Create Run Contents Report Run Files Out Report Query Files with this Box Query all Files with 0000892625 - 101 as home location

If information similar to the above appears, the file might be in Gimmal. Continue to Page 117.

0000892626 - 21.2.4 contents:

 0 Files Create

If information similar to the above appears, no files exist in Gimmal for the box. Click **Create** and continue to **When the file does not exist in Gimmal: Create and Request** (Page 123).

Request Delivery from the SRC: Files

See if the file exists in Gimmel

0000892625 - 101 contents:

11 Files (1 out) Show Create Run Contents Report Run Files Out Report Query Files with this Box [Query all Files with 0000892625 - 101 as home location](#)

Click once on the link text for **Query all Files with (box barcode number - box number) as home location** to go to the Files Home Page Grid. Choose this option instead of Query Files with this Box because this option shows all files assigned to the box, even those checked out of the box and delivered to a coworker at the agency. Query Files with this Box shows only files in the box.

Files Home Page Grid

The screenshot displays the Gimmel Files Home Page Grid. The top navigation bar includes links for Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. Below the navigation bar, there are tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The main content area shows a search bar with '0000892625 - 101' entered, and a list of 11 files. A red arrow points to the 'Query all Files with 0000892625 - 101 as home location' link in the top navigation bar.

File Barcode	Current Location	Organization Quick Description	Agency File Name	Agency Sub File Name	File Notes
0001274338	0000892625 - 101	Texas Big State Agency - 988 - East - -	A11	July	
0001274337	Roman O. Manager	Texas Big State Agency - 988 - East - -	A10	June	
0001274336	0000892625 - 101	Texas Big State Agency - 988 - East - -	A9	May	
0001274335	0000892625 - 101	Texas Big State Agency - 988 - East - -	A8	April	
0001274334	0000892625 - 101	Texas Big State Agency - 988 - East - -	A7	March	
0001274333	0000892625 - 101	Texas Big State Agency - 988 - East - -	A6	February	
0001274332	0000892625 - 101	Texas Big State Agency - 988 - East - -	A5	January	
0001274331	0000892625 - 101	Texas Big State Agency - 988 - East - -	A4	December	
0001274330	0000892625 - 101	Texas Big State Agency - 988 - East - -	A3	November	
0001274329	0000892625 - 101	Texas Big State Agency - 988 - East - -	A2	October	
0001274328	0000892625 - 101	Texas Big State Agency - 988 - East - -	A1	September	

The **Current Location** column shows which boxes are assigned to the box at the SRC and which files are assigned to someone at the agency.

Request Delivery from the SRC: Files

Files Home Page Grid: Request Delivery

The screenshot shows the Gimmal interface with a top navigation bar and a main content area. The main content area has a search bar and a table of files. The table has columns for File Barcode, Organization Quick Description, Agency File Name, Agency Sub File Name, Create Date, Created By Description, Last Modified Date, and Last Modified By Description. The table contains 11 rows of data. A red arrow points to the 'Request' button in the top navigation bar, labeled with a circled '2'. Another red arrow points to the 'Delivery from SRC' button in the table, labeled with a circled '3'. A third red arrow points to the first row of the table, labeled with a circled '1'.

File Barcode	Organization Quick Description	Agency File Name	Agency Sub File Name	Create Date	Created By Description	Last Modified Date	Last Modified By Description
0001274338	0000892625 - 101	Texas Big State Agency - 988 - East - -	A11	July			
0001274337	Roman O. Manager	Texas Big State Agency - 988 - East - -	A10	June			
0001274336	0000892625 - 101	Texas Big State Agency - 988 - East - -	A9	May			
0001274335	0000892625 - 101	Texas Big State Agency - 988 - East - -	A8	April			
0001274334	0000892625 - 101	Texas Big State Agency - 988 - East - -	A7	March			
0001274333	0000892625 - 101	Texas Big State Agency - 988 - East - -	A6	February			
0001274332	0000892625 - 101	Texas Big State Agency - 988 - East - -	A5	January			
0001274331	0000892625 - 101	Texas Big State Agency - 988 - East - -	A4	December			
0001274330	0000892625 - 101	Texas Big State Agency - 988 - East - -	A3	November			
0001274329	0000892625 - 101	Texas Big State Agency - 988 - East - -	A2	October			
0001274328	0000892625 - 101	Texas Big State Agency - 988 - East - -	A1	September			

If the file appears on this page (or on another page if there are multiple pages): Select it (1), click once (2) on Request, then click once (3) on Delivery from SRC and go When the file exists in Gimmal: Request Items screen (Page 119).

BOXYBIT Keep in mind that selecting files on multiple pages will result in only the files selected on the final page as being selected. To increase/decrease the number of items (up to 500 per page) viewable on a single home page grid, please see Supplemental Information: Preferences: Number of items on home page (Page 175).

If the file is not found on this page or any other page: Return to the View Box screen (click the back button on the web browser) and turn to When the file does not exist in Gimmal: Create and Request (Page 123).

When the file exists in Gimmel: Request Items screen

The screenshot shows the 'Request Items' screen in the Gimmel application. The interface includes a top navigation bar with links for Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. The main content area is titled 'Request Items' and contains several sections:

- Page 1 | Jump to Page:** A dropdown menu and a 'Go' button (Callout 1).
- Record Description:** A table with one row showing 'Remove' and 'A8 - 0001274335' (Callout 2).
- Enter, scan, or click the Search button to specify the desired destination:** A text input field containing 'Johnny Agency' and '0000774385' (Callout 3).
- Individuals/Boxes:** A section with tabs for 'Individuals' and 'Boxes'. The 'Individuals' tab is active, showing a form with fields for 'Individuals Barcode', 'User Name', 'First Name', 'Last Name', 'Address', and 'Email'. Below the form are 'Search' and 'Clear' buttons, and a '(Rollover for Current Search) (Rows Hidden)' button (Callout 4).
- Recent Transfer Destinations:** A table with columns 'Item Description', 'Item Barcode', and 'Tab'. It lists 'Dusty Box-Lid' and 'Jane Division' (Callout 5).
- Comments:** A text input field (Callout 6).
- Alternate Fulfillment Method:** A dropdown menu (Callout 7).
- Buttons:** 'Cancel' and 'Request' buttons in the top right corner (Callouts 8 and 9).

At the bottom of the screen, a license notice reads: 'Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request'.

- 1. Page Information:** Tells the number of request pages. There are 10 requests per request page. All requests will be submitted together.
- 2. Record Description:** The item(s) selected on the previous screen.
- 3. Delivery Destination:** The person who receives the delivery item(s). **Disregard *Enter, scan, or click the Search button to specify the desired destination.* This is a Gimmel textual error.**
BOXYBIT If the person who is to receive the item(s) is someone other than the person listed here, use the **Individuals** section (4) and see Page 120, **Change the delivery destination.** Do not use the **Boxes** tab.
- 5. Recent Transfer Destinations:** Please see **Change the delivery destination** (Page 120).
- 6. Comments:** This field can be used to provide information to assist the SRC driver who is delivering the item(s) or if a specific delivery date is needed.
- 7. Alternate Fulfillment Method:** Uses include **Rush Delivery, Scan On Demand (Files and Microforms only), or View or Receive Item at SRC.** Permanent Withdrawal is not used for file delivery request. If the file will not return to its box in the SRC and it needs to be deleted, please see **Supplemental Information: Delete or Permanent Withdrawal** (Page 217).
BOXYBIT Please see **Alternate Fulfillment Method** (Page 121).
- 8. Cancel button:** Click once to cancel this request and return to the home page.
- 9. Request button:** Click once when information on this screen is complete.

Request Delivery from the SRC: Files

Change the delivery destination

Recent Transfer Destinations

Johnny Agency

0000774385



Sometimes, a coworker other than the person named here is to be the delivery destination. In the above illustration, Johnny Agency is the **delivery destination**. To change the delivery destination for the box, use the **Recent Transfer Destinations** section if the person is listed.

BOXYBIT If the person is listed in *Recent Transfer Destinations*:

Recent Transfer Destinations

	Item Description	Item Barcode	Tab
Select	Jane Division	0000774386	

Click once on **Select** and continue to Page 121.

Individuals tab

Johnny Agency

0000774385



Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email
		DUSTY	BOX-LID		
Role					
Search	Clear	(Rollover for Current Search) (Rows Hidden)		Switch	

Page 1 | Jump to Page: The search found 0 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
---------------------	-----------	------------	-----------	---------	-------	------

To use the **Individuals** tab to search for the individual at the agency who is going to be the delivery destination, enter information for that person in any of the **Quick Search** fields to find that person and click once on **Search**.

Data Example: Dusty (in First Name) Box-Lid (in Last Name)

Johnny Agency

0000774385



Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email
		DUSTY	BOX-LID		
Role					
Search	Clear	(Rollover for Current Search) (Rows Hidden)		Switch	

Page 1 | Jump to Page: The search found 1 Individual

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
☒ 0000990129	Dusty.Box-Lid	Dusty	Box-Lid	The Big State Building, 200 Big State Highway, Austin, TX 78756	Dusty.Box-Lid@tbsa.texas.gov	Assignee

When a search result appears, click once on the radio button to the left of the person who is to be assigned as the delivery destination for this delivery request.

BOXYBIT If the person who is to be the delivery destination cannot be found in Gimmal, contact the agency's Records Management team to get that person added to Gimmal.

Request Delivery from the SRC: Files

Change the delivery destination (continued)

Dusty Box-Lid 

0000990129 

 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email
		DUSTY	BOX-LID		

Role
[]

(Rollover for Current Search) (Rows Hidden)

Page 1 | Jump to Page: [] The search found 1 Individual

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
☒ 0000990129	Dusty.Box-Lid	Dusty	Box-Lid	The Big State Building, 200 Big State Highway, Austin, TX 78756	Dusty.Box-Lid@tbsa.texas.gov	Assignee

When Johnny Agency selected Dusty Box-Lid as the delivery destination, Dusty's name replaced Johnny's name as the delivery destination.

Alternate Fulfillment Method

Alternate Fulfillment Method:

Permanent Withdrawal

Rush Delivery

Scan On Demand (Files and Microforms only)

View or Receive Item(s) at SRC

There are several options here (leave this field empty if this is a standard delivery):

- **Permanent Withdrawal:** Permanent Withdrawal is not used for file delivery request. If the file will not return to its box in the SRC and it needs to be deleted, please see ***Supplemental Information: Delete or Permanent Withdrawal*** (Page 217).
For Disaster Recovery: Permanent Withdrawal is not used for Disaster Recovery delivery.
- **Rush Delivery:** If this is a rush delivery (10 items or less), select this option. **Rush Delivery incurs additional fees.** For fees, please see the *Storage Fee Schedule and Imaging-Digital Fee Schedule*: <https://www.tsl.texas.gov/slr/storage>
BOXYBIT *When selecting RUSH delivery, call the SRC Circulation Desk (512-475-5155) after submitting this request so that they are aware of this RUSH delivery; request deadline is 2 p.m. for same-day delivery.*
- **Scan On Demand (Files and Microforms Only):** Please see ***Supplemental Information: Scan On Demand for Delivery*** (Page 193).
- **View or Receive Item(s) at SRC:** Select this to go to the SRC to view or receive the item(s) for delivery. Also use the comments field to provide contact information and when the item(s) should be ready.

For more information about Alternate Fulfillment Method, please see ***Supplemental Information: Alternate Fulfillment Method*** (Page 177).

Request Delivery from the SRC: Files

Submit the request delivery

The screenshot shows the 'Request Items' window in the Gimmal application. At the top, there's a navigation bar with 'Gimnal' logo and links for Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. The 'Request Items' window has a 'Cancel' and 'Request' button in the top right. Below the buttons is a search area with a 'Page 1 | Jump to Page: [] Go' and a 'Record Description' table with one row: 'Remove' and 'A8 - 0001274335'. Below this is a search input field with 'Johnny Agency' and '0000774385'. There are tabs for 'Individuals' and 'Boxes'. Below the tabs is a form with fields for 'Individuals Barcode', 'User Name', 'First Name', 'Last Name', 'Address', and 'Email'. There is a 'Role' field and a 'Search' button. Below the search form is a table with 'Page 1 | Jump to Page: [] Go' and 'The search found 0 Individuals'. The table has columns: 'Individuals Barcode', 'User Name', 'First Name', 'Last Name', 'Address', 'Email', and 'Role'. Below the table is a 'Recent Transfer Destinations' section with a table with columns: 'Item Description', 'Item Barcode', and 'Tab'. The table has two rows: 'Dusty Box-Lid' with barcode '0000990129' and 'Jane Division' with barcode '0000774386'. Below the table is a 'Comments' field and an 'Alternate Fulfillment Method' dropdown.

When information is complete on the Request Items screen, click once on **Request**.

Request Results

The screenshot shows the 'Request Results' window in the Gimmal application. At the top, there's a navigation bar with 'Gimnal' logo and links for Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. The 'Request Results' window has an 'Ok' button in the top right. Below the button is a 'Successful requests: 1' section with a message: 'Your request for the 'A8 - 0001274335' File was successfully submitted'.

This screen lists the items for the delivery request. This process is complete. The SRC barcode label for each file is generated at the SRC and affixed to the file. The client can use the barcode number on the label to find the file in Gimmal when it is time to return the file to the SRC. **Do not remove the SRC file barcode label.** Click once on **Ok** to return to the home page grid.

To cancel any Request, call the SRC Circulation Desk: 512-475-5155.

Waitlist

The screenshot shows a message box with a blue header: '1 request was added to the waitlist'. Below the header is a message: 'Your request for the 'Smith, Joe - 0000826079' File was successful, but you have been placed on the waitlist as there were already existing requests for this item.' A red arrow points to the 'Cancel Request' link.

Waitlist means that someone else has already requested the item for delivery or it is assigned to someone else at the agency (not at its home location). This delivery request will be processed to the delivery recipient when the item is returned to the SRC unless the request is canceled.

To cancel this Request, please click once on **Cancel** (noted above) and contact the SRC Circulation Desk (512-475-5155) so the SRC will know this request has been canceled. Otherwise, click **Home** to return to the home page not to cancel the request.

If this Waitlist delivery request is canceled, this confirmation will show:

The screenshot shows a confirmation message box with a blue header: 'No requests were added to the waitlist'. Below the header is a message: 'This request has been canceled'.

Request Delivery from the SRC: Files

When the file does not exist in Gimmel: Create and Request

0000892626 - 21.2.4 contents:

0 Files [Create](#)

When the File does not exist in Gimmel, click once on **Create**.

Create File screen

Organization populates based upon the Organization assignment for the box. Do not edit this field.

*Agency File Name

*Agency File Name:

Agency File Name is the name assigned to the file; it appears on the file's tab. Make sure the data entry matches the information on the file tab for the file at the SRC. Any character can be used except for the Pipe symbol (as explained in the Create Boxes sections). Do not press the Enter/Return key on the keyboard.

Data Example: Carlitos Alvaroz

Agency Sub File Name

Agency Sub File Name:

Agency Sub File Name is an optional field for additional file name information. Any character can be used except for the Pipe symbol. Do not press the Enter/Return key on the keyboard.

Data Example: Employee Incentives

File Notes

File Notes:

File Notes is an optional field for additional information about this file. Any character can be used except for the Pipe symbol. Do not press the Enter/Return key on the keyboard.

Data Example: First half of January 2025

Request Delivery from the SRC: Files

Completed: Create File screen

The newly created File will be located in the 0000892628 - 21.2.6 Box
Fields marked with an * are required.

*Organization: Texas Big State Agency - 988 - North - -

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Organization Quick Description
Search Here:				

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button. [Search] [Clear]

*Agency File Name: Carlitos Alvaroz

Agency Sub File Name: Employee Incentives

File Notes: First half of January 2025

Buttons: Cancel, Set Defaults, Save & Close, Save & View, Save & New

Save Options

Buttons: Cancel, Set Defaults, Save & Close, Save & View, Save & New

When the fields are complete, the next step is to **Save** the information.

These options are located at the Create File screen's top right:

- **Cancel:** Click once to cancel the create process for this item. It will not be saved.
- **Set Defaults:** Do not use Set Defaults. Selecting this can compromise the Create process. Set Defaults is cleared monthly by a Gimmal administrator.
- **Save & Close:** Do not use for this process.
- **Save & View:** Click once to move to the View File screen where Delivery Request will be made.
- **Save & New:** Do not use for this process.

Creating File information

Creating File

File with barcode 0002995350 successfully created at 6/18/2025 9:14:52 AM.

[Ok]

If the above dialogue box does not appear, an error message appears at the top of the screen. Correct the error and click the save option originally selected.

The create progress bar will display. When the above screen appears, it includes the File Barcode that was generated for this file. The barcode is the unique identification number applied to each item created in Gimmal. Click once on **Ok**. The next screen that appears is the View File screen.

Request Delivery from the SRC: Files

View File screen: Request Delivery

The screenshot shows the Gimmal application interface. At the top is a navigation bar with links for Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. The main window is titled 'View File: Carlitos Alvaroz - 0002995350'. On the left sidebar, the 'Request' tab is selected (indicated by a red arrow and circled '1'). Below it, the 'Delivery from SRC' option is highlighted (indicated by a red arrow and circled '2'). The main content area displays the following information:

- Organization Information:** Texas Big State Agency - 988 - North - -
- Organization Quick Description:** Texas Big State Agency - 988 - North - -
- Agency Name:** Texas Big State Agency - 988
- Division Name:** North
- Business Unit Name:**
- Sub Business Unit Name:**
- Agency File Name:** Carlitos Alvaroz
- Agency Sub File Name:** Employee Incentives
- File Notes:** First half of January 2025
- Locked Down:** Yes
- Current Location:** 0000892628 - 21.2.6
- Home Location:**

At the bottom of the screen, a status bar indicates: 'Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request'.

On the View File screen, click once (1) on **Request** then click once (2) on **Delivery from SRC**.

Request Delivery from the SRC: Files

Sections on Request Items screen

The screenshot shows the 'Request Items' screen in the Gimmal system. The interface includes a top navigation bar with links for Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. The main content area is titled 'Request Items' and contains several sections:

- Page 1 | Jump to Page:** A dropdown menu and a 'Go' button (Callout 1).
- Record Description:** A table with one row showing 'Remove' and 'Carlitos Alvaroz - 00029953' (Callout 2).
- Search Section:** A text input field with 'Johnny Agency' and '0000774385' (Callout 3), a 'Search' button, and a 'Clear' button.
- Individuals Section:** A tabbed interface with 'Individuals' and 'Boxes' tabs. The 'Individuals' tab contains fields for 'User Name', 'First Name', 'Last Name', 'Address', 'Email', and 'Role' (Callout 4).
- Recent Transfer Destinations:** A table with columns 'Item Description', 'Item Barcode', and 'Tab'. It lists 'Roman O. Manager' and 'Jane Division' (Callout 5).
- Comments:** A text input field (Callout 6).
- Alternate Fulfillment Method:** A dropdown menu (Callout 7).
- Buttons:** 'Cancel' and 'Request' buttons in the top right corner (Callouts 8 and 9).

At the bottom of the screen, a license notice reads: 'Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request'.

- Page Information:** Tells the number of request pages. There are 10 requests per request page. All requests will be submitted together.
- Record Description:** The item(s) selected on the previous screen.
- Delivery Destination:** The person who receives the delivery item(s). **Disregard *Enter, scan, or click the Search button to specify the desired destination.* This is a Gimmal textual error.**
BOXYBIT If the person who is to receive the item(s) is someone other than the person listed here, use the **Individuals** section (4) and see Page 127, **Change the delivery destination.** Do not use the **Boxes** tab.
- Recent Transfer Destinations:** Please see **Change the delivery destination** (Page 127).
- Comments:** This field can be used to provide information to assist the SRC driver who is delivering the item(s) or if a specific delivery date is needed.
- Alternate Fulfillment Method:** Uses include **Rush Delivery, Scan On Demand (Files and Microforms only), or View or Receive Item at SRC.** Permanent Withdrawal is not used for file delivery request. If the file will not return to its box in the SRC and it needs to be deleted, please see **Supplemental Information: Delete or Permanent Withdrawal** (Page 217).
BOXYBIT Please see **Alternate Fulfillment Method** (Page 128).
- Cancel button:** Click once to cancel this request and return to the home page.
- Request button:** Click once when information on this screen is complete.

Request Delivery from the SRC: Files

Change the delivery destination

Recent Transfer Destinations

Johnny Agency

0000774385



Sometimes, a coworker other than the person named here is to be the delivery destination. In the above illustration, Johnny Agency is the **delivery destination**. To change the delivery destination for the box, use the **Recent Transfer Destinations** section if the person is listed.

BOXYBIT If the person is listed in *Recent Transfer Destinations*:

Recent Transfer Destinations

	Item Description	Item Barcode	Tab
Select	Jane Division	0000774386	

Click once on **Select** and continue to Page 128.

Individuals tab

Johnny Agency

0000774385



Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email
		DUSTY	BOX-LID		
Role					
Search	Clear	(Rollover for Current Search) (Rows Hidden)		Switch	

Page 1 | Jump to Page: The search found 0 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
---------------------	-----------	------------	-----------	---------	-------	------

To use the **Individuals** tab to search for the individual at the agency who is going to be the delivery destination, enter information for that person in any of the **Quick Search** fields to find that person and click once on **Search**.

Data Example: Dusty (in First Name) Box-Lid (in Last Name)

Johnny Agency

0000774385



Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email
		DUSTY	BOX-LID		
Role					
Search	Clear	(Rollover for Current Search) (Rows Hidden)		Switch	

Page 1 | Jump to Page: The search found 1 Individual

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
☒ 0000990129	Dusty.Box-Lid	Dusty	Box-Lid	The Big State Building, 200 Big State Highway, Austin, TX 78756	Dusty.Box-Lid@tbsa.texas.gov	Assignee

When a search result appears, click once on the radio button to the left of the person who is to be assigned as the delivery destination for this delivery request.

BOXYBIT If the person who is to be the delivery destination cannot be found in Gimmal, contact the agency's Records Management team to get that person added to Gimmal.

Request Delivery from the SRC: Files

Change the delivery destination (continued)

Dusty Box-Lid
0000990129

Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email
		DUSTY	BOX-LID		

Role

Search Clear (Rollover for Current Search) (Rows Hidden) Switch

Page 1 | Jump to Page: Go The search found 1 Individual

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
0000990129	Dusty.Box-Lid	Dusty	Box-Lid	The Big State Building, 200 Big State Highway, Austin, TX 78756	Dusty.Box-Lid@texasbigstateagency.texas.gov	Assignee

When Johnny Agency selected Dusty Box-Lid as the delivery destination, Dusty's name replaced Johnny's name as the delivery destination.

Alternate Fulfillment Method

Alternate Fulfillment Method:

Permanent Withdrawal

Rush Delivery

Scan On Demand (Files and Microforms only)

View or Receive Item(s) at SRC

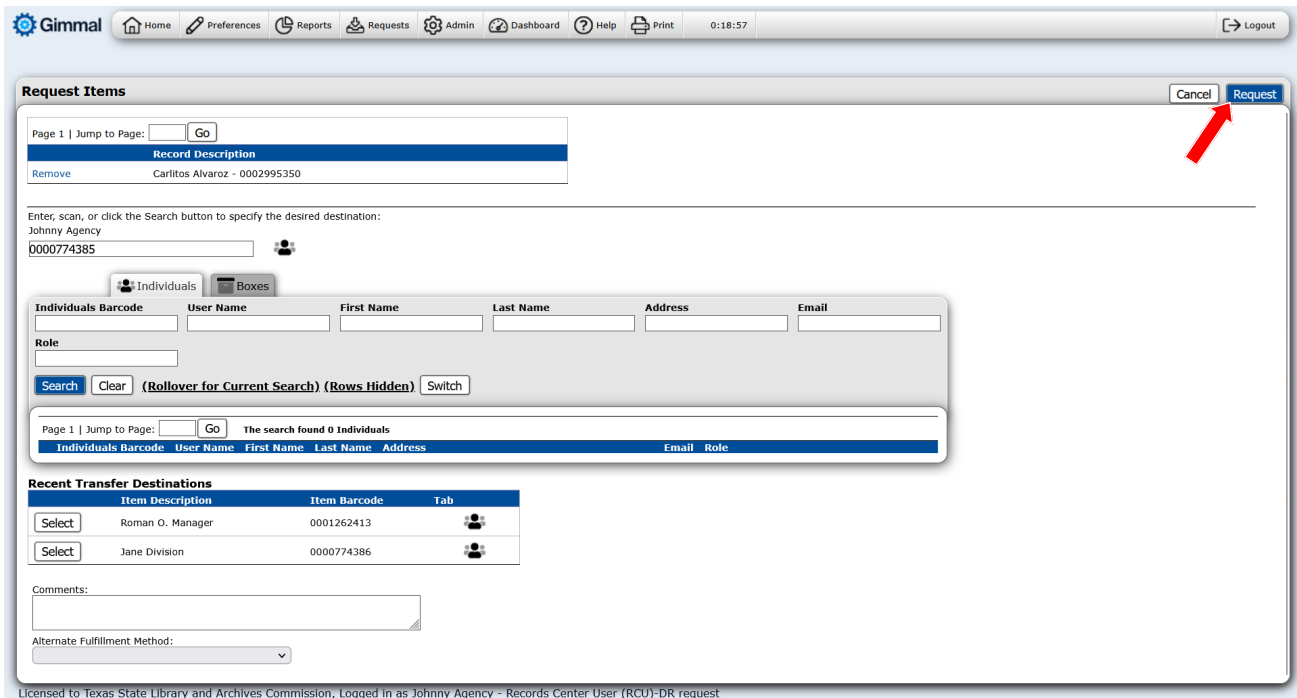
There are several options here (leave this field empty if this is a standard delivery):

- **Permanent Withdrawal:** Permanent Withdrawal is not used for file delivery request. If the file will not return to its box in the SRC and it needs to be deleted, please see ***Supplemental Information: Delete or Permanent Withdrawal (Page 217)***.
For Disaster Recovery: Permanent Withdrawal is not used for Disaster Recovery delivery.
- **Rush Delivery:** If this is a rush delivery (10 items or less), select this option. **Rush Delivery incurs additional fees.** For fees, please see the *Storage Fee Schedule and Imaging-Digital Fee Schedule*: <https://www.tsl.texas.gov/slr/storage>
BOXYBIT *When selecting RUSH delivery, call the SRC Circulation Desk (512-475-5155) after submitting this request so that they are aware of this RUSH delivery; request deadline is 2 p.m. for same-day delivery.*
- **Scan On Demand (Files and Microforms Only):** Please see ***Supplemental Information: Scan On Demand for Delivery (Page 193)***.
- **View or Receive Item(s) at SRC:** Select this to go to the SRC to view or receive the item(s) for delivery. Also use the comments field to provide contact information and when the item(s) should be ready.

For more information about Alternate Fulfillment Method, please see ***Supplemental Information: Alternate Fulfillment Method (Page 177)***.

Request Delivery from the SRC: Files

Submit the request delivery



The screenshot shows the 'Request Items' window in the Gimmal application. At the top, there is a navigation bar with links for Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. The main area contains a 'Request Items' form. It includes a 'Page 1 | Jump to Page: [] Go' section, a 'Record Description' table with one row for 'Carlitos Alvaroz - 0002995350', and a search section with a text input for 'Johnny Agency' and a 'Search' button. Below the search section is a table for 'Recent Transfer Destinations' with columns for 'Item Description', 'Item Barcode', and 'Tab'. The bottom of the form has a 'Comments' text area and an 'Alternate Fulfillment Method' dropdown. A red arrow points to the 'Request' button in the top right corner of the window.

Record Description
Remove Carlitos Alvaroz - 0002995350

Enter, scan, or click the Search button to specify the desired destination:
Johnny Agency
0000774385

Individuals Boxes

Individuals Barcode	User Name	First Name	Last Name	Address	Email

Role

Search Clear (Rollover for Current Search) (Rows Hidden) Switch

Page 1 | Jump to Page: [] Go The search found 0 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
---------------------	-----------	------------	-----------	---------	-------	------

Recent Transfer Destinations

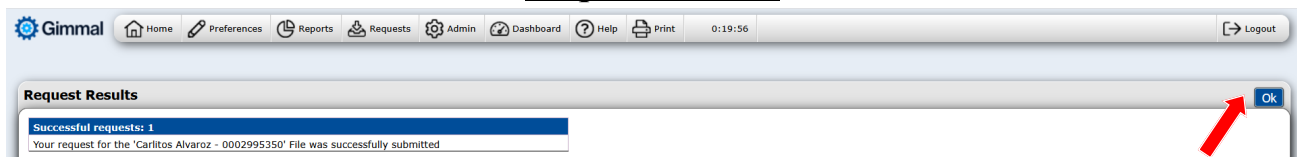
Item Description	Item Barcode	Tab
Select Roman O. Manager	0001262413	
Select Jane Division	0000774386	

Comments:

Alternate Fulfillment Method:

When information is complete on the Request Items screen, click once on **Request**.

Request Results



The screenshot shows the 'Request Results' window in the Gimmal application. It displays a message: 'Successful requests: 1' and 'Your request for the 'Carlitos Alvaroz - 0002995350' File was successfully submitted'. A red arrow points to the 'Ok' button in the top right corner of the window.

Successful requests: 1

Your request for the 'Carlitos Alvaroz - 0002995350' File was successfully submitted

This screen lists the items for the delivery request. This process is complete. The SRC barcode label for each file is generated at the SRC and affixed to the file. The client can use the barcode number on the label to find the file in Gimmal when it is time to return the file to the SRC. **Do not remove the SRC file barcode label.** Click once on **Ok** to return to the home page grid.

To cancel any Request, call the SRC Circulation Desk: 512-475-5155.

Request Delivery from the SRC: Files

NOTES

[illegible]

Request Delivery from SRC: Fiche Circulation: Microfiche Jackets

BOXYBIT *Gimmal clients outside of Austin:* Check with the agency's Records Management team to determine if Gimmal is used to Request Delivery since additional charges may apply. This section explains how to request delivery for individual microfiche jackets (also known as a microfiche partial bundle) using Fiche Circulation by way of the Microforms tab (where complete microfiche bundles are viewed). A microfiche partial bundle is any amount of microfiche jackets less than a complete microfiche bundle. *To request delivery for complete microfiche bundles, see Request Delivery from the SRC: Boxes, Disaster Recovery, Microfilm Reels, and Microfiche Bundles (Page 107).*

See *Supplemental Information: Scan On Demand for Delivery* (Page 193) to request microfiche images for delivery to a work email address.

Search for the microfiche bundle

1. Click once on the **Microforms** item type tab.
 2. Enter search terms into any of the **Quick Search** fields to find the microfiche bundle.
 3. Click once on **Search** (if the grid populates, continue to **Search results**, select the **microfiche bundle barcode** on Page 132).
- OR
4. Click once on **Search**.
 5. Click once on **Search Fields** and continue below.

Search Microforms screen

Enter search information into any fields (including the **Gimmal System Fields** at the bottom half of the screen) to find the microfiche bundle. Click once on **Execute**.

Request Delivery from SRC: Fiche Circulation: Microfiche Jackets

Search results, select the microfiche bundle barcode

Microform Barcode: 0000774371

Organization Quick Description: [Empty]

Agency Name: [Empty]

Division Name: [Empty]

Imaging Production Barcode: [Empty]

AIN: [Empty]

Record Series Title: [Empty]

Agency Reel Number: [Empty]

Eligible Destruction Date: [Empty]

Accessioned: [Empty]

Deleted: [Empty]

Create Date: [Empty]

Created By Description: [Empty]

Last Modified Date: [Empty]

Last Modified By Description: [Empty]

Hold Retention: [Empty]

Legacy Tracking Number: [Empty]

Search [Clear] (Rollover for Event Search) [Switch]

Request [Dropdown] Create & Update [Dropdown] View [Dropdown] Search [Dropdown] Export [Dropdown] The Cart [Dropdown]

Page 1 | Jump to Page: [Input] Go [Go]

The search found 1 Microform

Microform Barcode	Current Location	Home Location	Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definitive
0000774371	Location Masked	Location Masked	Texas Big State Agency - 988 - North - -	07	Employee Savings Bonds	CE	50			

Regardless of the Search method used from Page 131, the above illustration is the next screen. If microfiche jackets are needed for multiple microfiche bundles, create separate requests from each bundle since the requests are completed one at a time. Individual microfiche jackets are not identified on the Microforms tab, select the microfiche bundle where the microfiche jackets are located. Microfiche bundles must be at the SRC. Microfiche bundles at the SRC are designated (1) with  **Location Masked** in the Current Location. Click once (2) on the **Microform Barcode**.

View Microform

View Microform 0000774371 - 10

Request Create & Update View Search Export The Cart

Organization Information: Texas Big State Agency - 988 - North - -

Organization : Texas Big State Agency - 988 - North - -

Agency Name : Texas Big State Agency - 988

Division Name : North

Business Unit Name :

Sub Business Unit Name :

Imaging Production Information:

Imaging Production Quick Description :

Imaging Production Barcode :

Imaging Production Process Only: ☐

Event Code :

Schedule Status :

What media are we (TSL) creating? :

What are you sending us (TSL) to be imaged? (Media Type) :

Duplicate: ☐

Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request

(1) Scroll down the page to where **Fiche Contents** information is just above the **Gimmel System Fields** section.

Fiche Contents: Select Create

Hub Location: 0000085998

0000774371 - 10 contents:

4 Fiche Circulation [Show Create](#) [Run Contents Report](#) [Query Fiche Circulation with this Microform](#) [Query all Fiche Circulation with 0000774371 - 10 as home location](#)

Gimmel System Fields

Microform Barcode: 0000774371

The Contents section is where a record of previous Fiche Circulations are kept. If this fiche bundle has had previous Fiche Circulation requests, the Contents section will look like the above example (1). If there are no previous Fiche Circulation Requests, it will look like the below example (2). Each Fiche Circulation request has to be a new Fiche Circulation Barcode (do not use a previous Fiche Circulation Barcode). So, whether or not there are previous Fiche Circulation requests, always click once (3) on **Create** to make a new Fiche Circulation request.

Hub Location: 0000085998

0000845117 - 678 contents:

0 Fiche Circulation [Create](#)

Gimmel System Fields

Microform Barcode: 0000845117

Create Fiche Circulation screen

*Organization

The **Organization** is the Organization assigned to the Microfiche bundle. **Do not edit this field.**

Disregard these two fields

Number of Pulls:

Number of Pulls is a field that is completed by an employee at the SRC. The software does not allow this field to be hidden during this process.

Number of Fiche Pulled:

Number of Fiche Pulled is a field that is completed by an employee at the SRC. The software does not allow this field to be hidden during this process.

*Fiche Title(s) to Pull (separated by //)

Fiche Title(s) to Pull (separated by //) is where the title bar information for each microfiche jacket requested is listed. The title bar is the information area at top of a microfiche jacket. Place a // between each microfiche title in the bundle to assist the SRC employee to know there are multiple titles in this request.

Data Example Multiple Items: 04/10/2012 // 07/03/2012 // 12/28/2012

Data Example Single Item: 04/10/2012

Request Delivery from SRC: Fiche Circulation: Microfiche Jackets

Completed: Create Fiche Circulation screen:

Cancel Set Defaults Save & Close Save & View Save & New

The newly created Fiche Circulation will be located in the 0000774371 - 10 Microform
Fields marked with an * are required.

*Organization Quick Description: Texas Big State Agency - 988 - North - -

Search Here: Agency Name Division Name Business Unit Name Business Sub-Unit Name Deleted Organization Quick Description

Current Search: There is no current Organization Quick Description query. To search Organization Quick Description, enter your criteria and click the Search button. Search Clear

Number of Pulls:

Number of Fiche Pulled:

*Fiche Title(s) to Pull (04/10/2012 // 07/03/2012 // 12/28/2012 separated by //):

Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request

Save Options

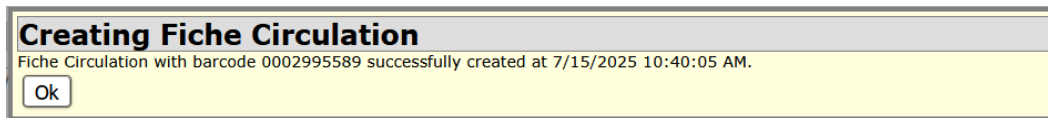
Cancel Set Defaults Save & Close Save & View Save & New

When the data fields are complete, the next step is to **Save** the information.

These options are located at the Create Box screen's top right:

- **Cancel:** Click once to cancel the create process for this item. It will not be saved.
- **Set Defaults:** Do not click Set Defaults. Selecting this can compromise the Create process.
- **Save & Close:** Click once if Request Delivery is not going to be completed at this time. Search will need to be completed later to find the unrequested item to complete Request Delivery.
- **Save & View (recommended):** Click once if only one item is to be created and Request Delivery is ready to be completed.
- **Save & New:** This is not used for this process since multiple microfiche titles from the same bundle can be included on this request screen.

Creating Fiche Circulation information



The create progress bar will display; if the above information does not appear, an error message appears at the top of the screen. Correct the error and click the original save option.

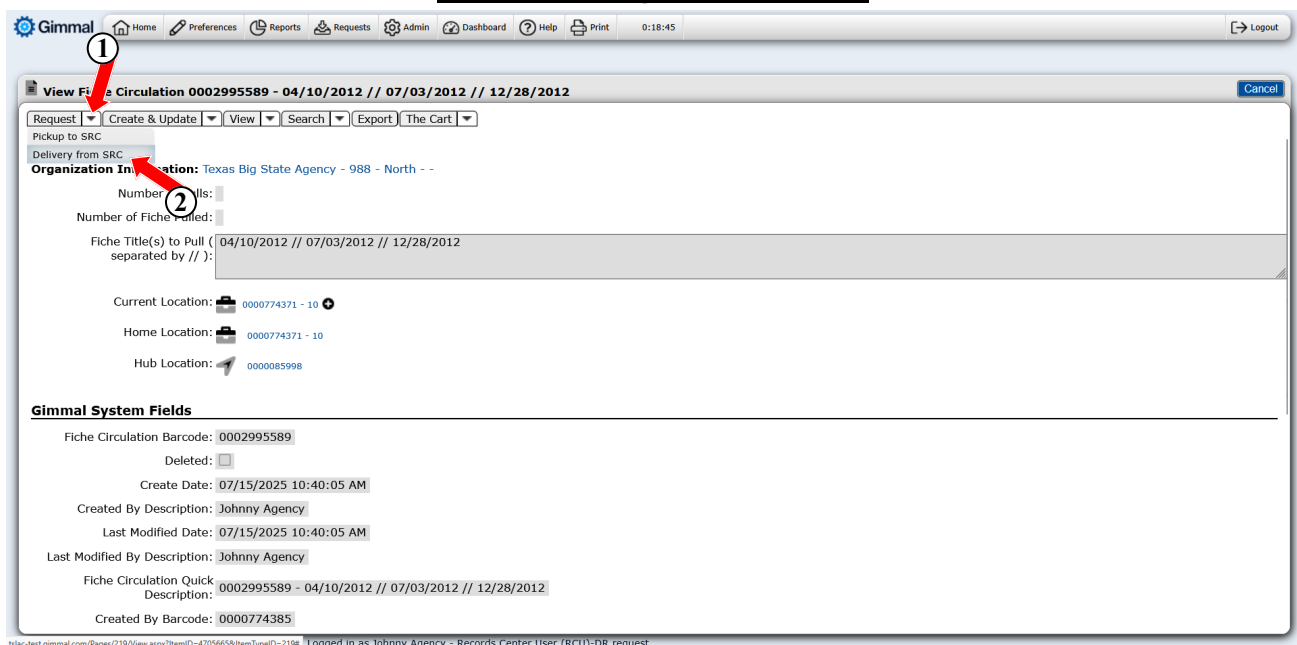
When the above information appears, it includes the fiche circulation barcode that was generated. The barcode number is the unique identification number applied to each item created. Click once on **Ok**.

Then, if selected:

- **Save & Close:** The item is saved in Gimmal and the Fiche Circulation home page appears. When it is time to request delivery, turn to **After clicking Save & Close** (Page 137).
- **Save & View:** Review information on the View Fiche Circulation and continue below.

REQUEST DELIVERY FOR MICROFICHE JACKETS

After clicking Save & View



From the **View Fiche Circulation** screen, review to make sure the information is correct. If everything is correct, click once (1) on **Request** and click once (2) on **Delivery from SRC** and turn to **Request Items** screen (Page 139).

BOXYBIT If changes need to be made, click **Create & Update** and select **Update** and see **Supplemental Information: Update / Bulk Update** (Page 211). Later, find the item on the **Fiche Circulation** tab and request delivery.

Request Delivery from SRC: Fiche Circulation: Microfiche Jackets

After clicking Save & Close

The screenshot shows the Gimmal interface with the 'Fiche Circulation' tab selected. The top navigation bar includes Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. The main area contains several input fields: 'Fiche Circulation Barcode', 'Organization', 'Number of Pulls', 'Number of Fiche Pulled', 'Fiche Title(s) to Pull (separated by //)', 'Deleted', 'Create Date', and 'Created By Description'. A 'Search' button is located below the 'Fiche Circulation Barcode' field. A 'Search Fields' dropdown menu is open, showing options: Keyword, Location, Number of Pulls, Number of Fiche Pulled, Fiche Title(s) to Pull (separated by //), Duplicate, and Query. Red arrows and numbers 1 through 5 indicate the steps for performing a search: 1. Click on the 'Fiche Circulation' tab. 2. Enter search terms into any of the 'Quick Search' fields. 3. Click on the 'Search' button. 4. Click on the 'Search' button again. 5. Click on the 'Search Fields' dropdown menu.

To find the Fiche Circulation that lists the microfiche jacket(s) to be delivered from the SRC, there are two ways to perform a search:

1. Click once on the **Fiche Circulation** item type tab to search.
2. Enter search terms into any of the **Quick Search** fields to find the **Fiche Circulation**.
3. Click once on **Search** and if results populate the grid, continue to **Search results**, select the item (Page 138).

OR

4. Click once on **Search**.
5. Click once on **Search Fields** and continue below.

Search for Fiche Circulation screen

The screenshot shows the 'Search for Fiche Circulation' screen. The top navigation bar includes Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. The main area contains several input fields: 'Organization Quick Description', 'Agency Name', 'Division Name', 'Business Unit Name', 'Business Sub-Unit Name', 'Deleted', 'Organization Quick Description', 'Current Search', 'Number of Pulls', 'Number of Fiche Pulled', 'Fiche Title(s) to Pull (separated by //)', 'Locked Down', 'Fiche Circulation Barcode', 'Current Location', 'Current Location Item Type ID', 'Current Location Quick Description', and 'Current Location Barcode'. A 'Search' button is located below the 'Current Search' field. A 'Search' button is also located below the 'Current Location' field. A 'Search' button is also located below the 'Current Location Item Type ID' field. A 'Search' button is also located below the 'Current Location Quick Description' field. A 'Search' button is also located below the 'Current Location Barcode' field. A red arrow points to the 'Execute' button in the top right corner.

Enter search information into any fields (including the **Gimmal System Fields** on the bottom half of the screen) to find the item(s) to request delivery. Click once on **Execute**.

Request Delivery from SRC: Fiche Circulation: Microfiche Jackets

Search results, select the item

Barcode	Current Location	Organization	Number of Pulls	Number of Fiche Pulled	Fiche Title(s) to Pull (separated by //)
0002995589	0000774371 - 10	Texas Big State Agency - 988 - North - -			04/10/2012 // 07/03/2012 // 12/28/2012

Regardless of the Search method used from Page 137, the above illustration is the next screen. Click the checkbox(es) (1) for the Fiche Circulation item(s) to request delivery from the SRC. If there is more than one item and all need to be selected, click the checkbox on the left side of the column header ribbon (2) to select all of the items.

BOXYBIT A setting in Preferences could limit the number of items that appear on a single home page. Clicking the Select All checkbox selects the items on this single page, not the items on every page (if there is more than one page noted above the column headers ribbon). To increase/decrease the number of items (up to 500 per page) viewable on a single home page grid, see **Supplemental Information: Preferences: Number of items on home page (Page 175)**.

Request Delivery

Barcode	Current Location	Organization	Number of Pulls	Number of Fiche Pulled	Fiche Title(s) to Pull (separated by //)
0002995589	0000774371 - 10	Texas Big State Agency - 988 - North - -			04/10/2012 // 07/03/2012 // 12/28/2012

After selecting the Fiche Circulation item(s), click once (3) on **Request** and click once (4) on **Delivery from SRC**.

Request Items screen

The screenshot shows the 'Request Items' screen in the Gimmal system. It includes a navigation bar at the top with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. The main content area has several sections: a 'Request Items' header with a 'Page 1 | Jump to Page: [] Go' link (1); a 'Record Description' table (2) with one row showing 'Remove 0002995589 - 04/10/2012 // 07/03/2012 // 12/28/2012'; a 'Delivery Destination' section (3) with a search input and a 'Search' button; a 'Individuals' section (4) with tabs for 'Individuals' and 'Microforms', and a form with fields for 'Individuals Barcode', 'User Name', 'First Name', 'Last Name', 'Address', and 'Email'; a 'Recent Transfer Destinations' table (5) with columns 'Item Description', 'Item Barcode', and 'Tab'; a 'Comments' text area (6); and an 'Alternate Fulfillment Method' dropdown (7). At the top right, there are 'Cancel' (8) and 'Request' (9) buttons. The footer indicates the user is logged in as 'Johnny Agency - Records Center User (RCU)-DR request'.

1. **Page Information:** Tells the number of request pages. There are 10 requests per request page. All requests will be submitted together.
2. **Record Description:** The item(s) selected on the previous screen.
3. **Delivery Destination:** The person who receives the delivery item(s). **Disregard *Enter, scan, or click the Search button to specify the desired destination.* This is a Gimmal textual error.**
BOXYBIT If the person who is to receive the item(s) is someone other than the person listed here, use the **Individuals** section (4) and see Page 140, **Change the Delivery Destination**.
5. **Recent Transfer Destinations:** Please see **Change the delivery destination** (Page 140).
6. **Comments:** This field can be used to provide information to assist the SRC driver who is delivering the item(s) or if a specific delivery date is needed.
7. **Alternate Fulfillment Method:** Uses include **Rush Delivery, Scan On Demand (Files and Microforms only), or View or Receive Item at SRC**. Permanent Withdrawal is not used for Fiche Circulation. If the fiche circulation will not return to its microfiche bundle in the SRC and it needs to be deleted, please see **Supplemental Information: Delete Or Permanent Withdrawal** (Page 217).
BOXYBIT Please see **Alternate Fulfillment Method** (Page 141).
8. **Cancel button:** Click once to cancel this request and return to the home page.
9. **Request button:** Click once when information on this screen is complete.

Change the delivery destination

Recent Transfer Destinations

Johnny Agency

0000774385



Sometimes, a coworker other than the person named here is to be the delivery destination. In the above illustration, Johnny Agency is the **delivery destination**. To change the delivery destination for the box, use the **Recent Transfer Destinations** section if the person is listed.

BOXYBIT If the person is listed in *Recent Transfer Destinations*:

Recent Transfer Destinations

	Item Description	Item Barcode	Tab
	Dusty Box-Lid	0000990129	

Click once on **Select** then continue to Page 141.

Individuals tab

Johnny Agency

0000774385



 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email
		DUSTY	BOX-LID		
Role					
 Search  Clear (Rollover for Current Search) (Rows Hidden)  Switch					

Page 1 | Jump to Page: Go
The search found 0 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
---------------------	-----------	------------	-----------	---------	-------	------

To use the **Individuals** tab to search for the individual at the agency who is going to be the delivery destination, enter information for that person in any of the **Quick Search** fields to find that person and click once on **Search**.

Data Example: Dusty (in First Name) Box-Lid (in Last Name)

Johnny Agency

0000774385



 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email
		DUSTY	BOX-LID		
Role					
 Search  Clear (Rollover for Current Search) (Rows Hidden)  Switch					

Page 1 | Jump to Page: Go
The search found 1 Individual

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
☒ 0000990129	Dusty.Box-Lid	Dusty	Box-Lid	The Big State Building, 200 Big State Highway, Austin, TX 78756	Dusty.Box-Lid@tbsa.texas.gov	Assignee

When a search result appears, click once on the radio button to the left of the person who is to be assigned as the delivery destination for this delivery request.

BOXYBIT If the person who is to be the delivery destination cannot be found in Gimmal, contact the agency's Records Management team to get that person added to Gimmal.

Dusty Box-Lid

0000990129



When Johnny Agency selected **Dusty Box-Lid** as the delivery destination (either from recent Transfer Destinations or using the Individuals tab), Dusty's name replaced Johnny's name as the delivery location.

Alternate Fulfillment Method

Alternate Fulfillment Method:

- Permanent Withdrawal
- Rush Delivery
- Scan On Demand (Files and Microforms only)
- View or Receive Item(s) at SRC

There are several options here (leave this field empty if this is a standard delivery):

- **Permanent Withdrawal:** This is not used for Fiche Circulation.
- **Rush Delivery:** If this is a rush delivery (10 items or less), select this option. **Rush Delivery incurs additional fees.** For fees, please see the *Storage Fee Schedule and Imaging-Digital Fee Schedule*: <https://www.tsl.texas.gov/slr/storage>
BOXYBIT When selecting RUSH delivery, call the SRC Circulation Desk (512-475-5155) after submitting this request so that they are aware of this RUSH delivery; request deadline is 2 p.m. for same-day delivery.
- **Scan On Demand (Files and Microforms Only):** Please see *Supplemental Information: Scan On Demand for Delivery* (Page 193).
- **View or Receive Item(s) at SRC:** Fiche Circulation items can be given to the client at the SRC but they cannot be viewed on equipment at the SRC.

For more information about Alternate Fulfillment Method, please see *Supplemental Information: Alternate Fulfillment Method* (Page 177).

Review the Request Items screen

Request Items

Page 1 | Jump to Page: Go

Record Description
Remove 0002995589 - 04/10/2012 // 07/03/2012 // 12/28/2012

Enter, scan, or click the Search button to specify the desired destination:
 Dusty Box-Lid
 0000990129

①

Individuals Microforms

Individuals Barcode	User Name	First Name	Last Name	Address	Email

Role

Search Clear (Rollover for Current Search) (Rows Hidden) Switch

Page 1 | Jump to Page: Go The search found 0 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role

Recent Transfer Destinations

Item Description	Item Barcode	Tab
Select Dusty Box-Lid	0000990129	

Comments:
 Ring bell on Loading Dock. ②

Alternate Fulfillment Method:

Cancel Request

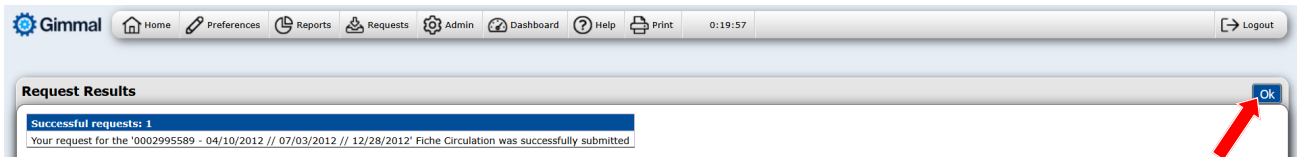
③

Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request

Johnny Agency assigned Dusty Box-Lid (1) as the delivery destination for the microfiche jackets. In the **Comments** field (2), Johnny has a special request for the SRC delivery driver. Once the screen is complete, click once (3) on **Request**.

Request Delivery from SRC: Fiche Circulation: Microfiche Jackets

Request Results



This screen lists the items for the delivery request. This process is complete. The person assigned as the delivery destination will receive the microfiche jackets in a delivery envelope. Please keep the delivery envelope to return the microfiche jackets to the SRC. It also has the SRC barcode label to help find the item on the Fiche Circulation tab when it is time to return it to the SRC.

Click once on **Ok** to return to the microforms home page grid.

To review requests submitted, click **Requests** at the top of the screen then click the link for tab for the request. This is user specific, requests submitted by other users are not seen.

To cancel any Request, call the SRC Circulation Desk: 512-475-5155.

Request Delivery from SRC: Fiche Circulation: Microfiche Jackets

NOTES

[illegible]

Request Delivery from SRC: Fiche Circulation: Microfiche Jackets

NOTES

[illegible]

Imaging Production:

Create a Work Order for SRC imaging

The **Imaging Production** item type tab is used to instruct the SRC imaging department about what needs to be done for a finished product (for example, filming a box of paper files to be images on a reel of microfilm).

The screenshot shows the Gimmel web application interface. At the top is a navigation bar with links: Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and a Logout button. Below this is a secondary navigation bar with tabs: Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production (highlighted), and Records Series. The main content area is titled 'Imaging Production' and contains a form with fields for 'Barcode', 'Organization Quick Description', 'Agency Name', 'Division Name', 'Contact Name', 'Create Date', and 'Created By Description'. A red arrow labeled '1' points to the 'Imaging Production' tab. Another red arrow labeled '2' points to the 'Create' button in the 'Action Buttons' section at the bottom of the form. The 'Action Buttons' section also includes 'Request', 'View', 'Search', 'Export', and 'The Cart' buttons. A status bar at the bottom right indicates '(0 Items)'.

1. Click once on the **Imaging Production** item type tab.
2. Click once on **Create** in the Action Buttons.

Imaging Production: Create a Work Order for SRC Imaging

BOXYBIT All fields with an asterisk (*) are required fields. The page does not process without completing these required fields.

Create Imaging Production

Home

Preferences

Reports

Requests

Admin

Dashboard

Help

Print

0:13:37

Logout

Create Imaging Production

CancelSet DefaultsSave & CloseSave & ViewSave & New

Fields marked with an * are required.

*Imaging Production Barcode:

*Organization:

Agency NameDivision NameBusiness Unit NameBusiness Sub-Unit NameOrganization Quick Description

Search Here:

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

SearchClear

Records Series:

Organization Quick DescriptionAINRSINRecord Series TitleEvent CodeYears

Search Here:

Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button.

SearchClear

*Contact Name:

*Contact Phone Number (and extension):

Created Item(s) will be stored at the SRC:☐

Source Item(s) will be stored at the SRC:☐

*Number of Items Being Sent:

*What is being sent to TSL imaging to be imaged?:

Source Item(s) in storage at the SRC:☐

If Source Item is stored at the SRC, how many will TSL imaging use?:

Agency Reel Number Range / Box Number Range / Item Barcode(s):

*Earliest File Date:

*Latest File Date:

*What product type is TSL imaging creating?:

*What product size is TSL imaging creating?:

Beginning File:

Ending File:

Imaging Production Process Only:☐

Duplicate:

Number of Duplicates:

Type of Duplicate:

Addition:

Document Preparation:

Notes or Brief Project Description:

Legal Holds:

Select AllRemove AllLegal Holds selected: 0Selected Legal Holds

Page 1 | Jump to Page: Go

Quick DescriptionHold CodeHold NameHold StatusHold TypeAuthorized By IndividualReleased By Individual

Legal Holds

Hold CodeHold NameHold StatusHold TypeAuthorized By IndividualReleased By Individual

SearchClear(Rollover for Current Search)Switch

Page 1 | Jump to Page: GoThe search found 0 Legal Holds

Hold CodeHold NameHold StatusHold TypeAuthorized By IndividualReleased By Individual

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Gimmel Instruction Guide - Records Center User, 01/2026

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SRC = State Records Center

Imaging Production: Create a Work Order for SRC Imaging

*Imaging Production Barcode

*Imaging Production Barcode: 0002982193

The **Imaging Production Barcode** is an auto-generated barcode created by Gimmel that is assigned to the Imaging Production request. This field cannot be edited.

*Organization

*Organization: 5

Agency Name **Division Name** **Business Unit Name** **Business Sub-Unit Name** **Deleted** **Organization Quick Description**

Search Here:

Current Search: Find all Organization.

Page 1 | Jump to Page: Go The search found 6 Items

Agency Name	Division Name	Business Unit Name	Business Sub-Unit Name	Deleted	Organization Quick Description
☐ Texas Big State Agency - 988	Central			False	Texas Big State Agency - 988 - Central - -
☐ Texas Big State Agency - 988	East			False	Texas Big State Agency - 988 - East - -
☐ Texas Big State Agency - 988	West			False	Texas Big State Agency - 988 - West - -
☐ Texas Big State Agency - 988	North			False	Texas Big State Agency - 988 - North - -
☐ Texas Big State Agency - 988	South			False	Texas Big State Agency - 988 - South - -
☐ 988 - Gimmel Organization Control				False	988 - Gimmel Organization Control - - -

1

Click once **(1)** on **Search** to find all Organizations assigned to the account or use the **Quick Search** area **(2)** to find a specific Organization then click Search. Select the **Organization** associated with this item by clicking once **(3)** on the radio button at the left side of the screen. Do not select **(4)** the **Gimmel Organization Control**. It is here for technical reasons. The selected Organization will populate **(5)** in the **Organization** field.

BOXYBIT Is the needed Organization missing? Contact the agency's Records Management team.

Records Series

Records Series: 54 - Computer Inventory / Telephone Records

Organization Quick Description **AIN** **RSIN** **Record Series Title** **Event Code** **Years**

Search Here:

Current Search: Find all Records Series where AIN Contains '54'.

Page 1 | Jump to Page: Go The search found 1 Item

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Remarks
☒ Texas Big State Agency - 988 - - -	54		Computer Inventory / Telephone Records	AC	40			AC=Computer Install date or phone billing date	

2

Records Series needs to be completed if the product the SRC imaging department is creating and/or if the Source Item provided will be stored at the SRC. Use **Quick Search** fields **(1)** to find a specific Record Series Title or use a general search term to narrow the selection of Record Series Titles and click once **(2)** on **Search**. Select the Record Series Title by clicking once **(3)** on the radio button at the left side of the screen.

BOXYBIT Is the needed Record Series Title missing? Contact the agency's Records Management team. This section can be used to reset the timer. See **Supplemental Information: Timer** (Page 191).

How these fields look when completed:

*Imaging Production Barcode: 0002995358

*Organization: Texas Big State Agency - 988 - North - -

Agency Name **Division Name** **Business Unit Name** **Business Sub-Unit Name** **Organization Quick Description**

Search Here:

Current Search: Find all Organization where Division Name Contains 'North'.

Page 1 | Jump to Page: Go The search found 1 Item

Organization Quick Description
☒ Texas Big State Agency - 988 - North - -

Records Series: 54 - Computer Inventory / Telephone Records

Organization Quick Description **AIN** **RSIN** **Record Series Title** **Event Code** **Years**

Search Here:

Current Search: Find all Records Series where AIN Contains '54'.

Page 1 | Jump to Page: Go The search found 1 Item

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Remarks
☒ Texas Big State Agency - 988 - - -	54		Computer Inventory / Telephone Records	AC	40			AC=Computer Install date or phone billing date	

Imaging Production: Create a Work Order for SRC Imaging

Contact Name

*Contact Name:

Contact Name is the person the SRC imaging department contacts concerning this Imaging Production.

Data Example: Johnny Agency

Contact Phone Number (and extension)

*Contact Phone Number (and extension):

Contact Phone Number is the phone number for the person listed as the Contact Name.

Data Example: 512-555-4567

Created Item(s) will be stored at SRC

Created Item(s) will be stored ☐
at the SRC:

Click once on this checkbox if the product the SRC imaging department is creating is to be stored at the SRC; the SRC employee will complete the appropriate tab for storage.

BOXYBIT If this checkbox is selected, the Records Series field must be completed.

Source Item(s) will be stored at SRC

Source Item(s) will be stored at ☐
the SRC:

Source Item is the material (like box of paper) being sent for this Imaging Production. Click once on this checkbox if the item the SRC imaging department is using to create an imaging product is to be stored at the SRC; the SRC employee will complete the appropriate tab for storage.

BOXYBIT If this checkbox is selected, the Records Series field must be complete

*Number of Items Being Sent

*Number of Items Being Sent:

Number of Items being sent is a required field. This is the total number of containers for the Source Items being sent from the agency or from the storage area of the SRC to be received by TSL imaging to create the final imaging product.

How these fields look when completed:

*Contact Name:

*Contact Phone Number (and extension):

Created Item(s) will be stored at the SRC: ☐

Source Item(s) will be stored at the SRC: ☒

*Number of Items Being Sent:

***What is being sent to TSL imaging to be imaged?**

*What is being sent to TSL imaging to be imaged?:

▼

Diazo 16mm - 2.5mil
Diazo 16mm - 5mil
Diazo 35mm - 5mil
Electronic
Hard Copy
Microfiche (Duplicate)
Microfiche (Original)
PROCESS ONLY-16mm-2.5mil
PROCESS ONLY-16mm-5mil
PROCESS ONLY-35mm-5mil
Silver 16mm - 2.5mil
Silver 16mm - 5mil
Silver 35mm - Direct/Positive
Silver 35mm - Print/Negative

What is being sent to TSL imaging to be imaged is a required field. This is the medium type for the source documents being provided to the SRC imaging department.

BOXYBIT *With the exceptions of Diazo and Process Only, all other media types are eligible for storage at the SRC:*

- **Diazo 16mm-2.5mil***: Diazo is a less durable microfilm used for non-archival, non-permanent information in 16 millimeter, 2.5mil. Not eligible for storage at the SRC.
- **Diazo 16mm-5mil***: Diazo is a less durable microfilm used for non-archival, non-permanent information in 16 millimeter, 5mil. Not eligible for storage at the SRC.
- **Diazo 35mm-5mil***: Diazo is a less durable microfilm used for non-archival, non-permanent information in 35 millimeter, 5mil. Not eligible for storage at the SRC.
- **Electronic**: Compact Disc, Portable Hard Drive, USB Flash Drive, or other type.
- **Hard Copy**: Paper documents (loose papers, files, or bound documents in boxes).
- **Microfiche (Duplicate)**: Microfilm cut and inserted into microfiche jackets, duplicate version. Not eligible for storage at the SRC.
- **Microfiche (Original)**: Microfilm cut and inserted into microfiche jackets.
- **PROCESS ONLY-16mm-2.5mil***: Created reels that need to be processed.
- **PROCESS ONLY-16mm-5mil***: Created reels that need to be processed.
- **PROCESS ONLY-35mm-5mil***: Created reels that need to be processed.
- **Silver 16mm-2.5mil***: More durable silver gelatin (or silver halide) microfilm used for archival and permanent information in 16 millimeter, 2.5 mil.
- **Silver 16mm-5mil***: More durable silver gelatin (or silver halide) microfilm used for archival and permanent information in 16 millimeter, 5mil.
- **Silver 35mm-Direct/Positive**: More durable silver gelatin (or silver halide) microfilm used for archival and permanent information in 35 millimeter filmed as an identical image.
- **Silver 35mm-Print/Negative**: More durable silver gelatin (or silver halide) microfilm used for archival and permanent information in 35 millimeter filmed as a negative or opposite-appearing image.

* 1 mil = 0.001 of an inch film thickness.

How this field looks when completed:

*What is being sent to TSL imaging to be imaged?: Hard Copy

Imaging Production: Create a Work Order for SRC Imaging

Source Item(s) in storage at the SRC

Source Item(s) in storage at
the SRC: ☐

If the Source Item being provided to TSL imaging to create the final imaging product is already in storage at the SRC, click once on this checkbox.

If Source Item is stored at the SRC, how many will TSL imaging use?

If Source Item is stored at the
SRC, how many will TSL
imaging use?:

If the Source Item is in storage at the SRC, how many of those containers (boxes, microfilm reels, etc.) will the SRC imaging department access to create the final imaging product? This will be the same number used to complete the field for **Number of Items being sent**.

BOXYBIT *If the source material is at the agency, leave this field empty.*

Data Example: 3

Agency Reel Number Range / Box Number Range / Item Barcode(s)

Agency Reel Number Range /
Box Number Range / Item
Barcode(s):

The beginning and ending container numbers and/or the first and last Gimmal barcode numbers for the Source Items TSL imaging will be using. If using box numbers or reel numbers, make sure each container number is visible on the container. In this field, list only the first and last container numbers in the shipment or the barcode numbers.

BOXYBIT *The box number is written on the box. To learn more about that process, please see **Preparing Records for Storage at the State Records Center in Gimmal Resources**. Even if the boxes are not going to be stored at the SRC, they still need to be numbered.*

Barcode refers to the barcode for the item found in Gimmal.

Data Example: 10 through 12 NOTE: This is for boxes 10, 11, and 12.

How these fields look when completed:

Source Item(s) in storage at
the SRC: ☐

If Source Item is stored at the
SRC, how many will TSL
imaging use?:

Agency Reel Number Range /
Box Number Range / Item
Barcode(s): 10 through 12 NOTE: This is for boxes 10, 11, and 12.

Imaging Production: Create a Work Order for SRC Imaging

*Earliest File Date

*Earliest File Date: 

The **Earliest File Date** is the date information for the earliest date for all items in the box(es). The date information is entered in this format with forward slashes and no spaces:

MM/DD/YYYY

Optional step: Click the calendar icon  to select the date from the calendar.

Data Example: 01/01/2025

*Latest File Date

*Latest File Date: 

The **Latest File Date** is the date information for the latest date for all items in the box(es). The date information is entered in this format with forward slashes and no spaces:

MM/DD/YYYY

Optional step: Click the calendar icon  to select the date from the calendar.

Data Example: 06/15/2025

BOXYBIT *If the Earliest File Date and the Latest File Date are the same, enter the same date into both fields.*

What product type is TSL imaging creating?

*What product type is TSL imaging creating?:

Diazo

Flash Drive/USB

FTP Link

Microfiche Jackets

Original

Silver

TSL USE ONLY-DO NOT SELECT - Obsolete Media Types

What is selected here tells the SRC imaging department what medium type the final imaging product will be.

BOXYBIT *With the exception of Diazo, all media types are eligible to be stored at the SRC:*

- **Diazo:** Less durable microfilm used for non-archival, non-permanent information. Diazo is not eligible for storage at the SRC.
- **Flash Drive/USB:** Data saved to a portable flash drive or universal serial bus (USB) thumb drive.
- **FTP Link:** Data saved to a File Transfer Protocol (FTP) upload website (like Dropbox).
- **Microfiche Jackets:** 16millimeter or 35millimeter microfilm sliced and inserted into microfiche jackets.
- **Original:** The first generation reel of microfilm.
- **Silver:** More durable microfilm used for archival and/or permanent information.
- **TSL USE ONLY-DO NOT SELECT - Obsolete Media Types:** Do not select this, it is used as a record of media types TSL no longer uses.

How these fields look when completed:

*Earliest File Date: 

*Latest File Date: 

*What product type is TSL imaging creating?:

Imaging Production: Create a Work Order for SRC Imaging

*What product size is TSL imaging creating?

*What product size is TSL imaging creating?:

▼

Diazo - Microfiche
Diazo 16mm - 2.5mil
Diazo 16mm - 5mil
Diazo 35mm - 5mil
Flash Drive/USB
FTP Link
Silver - Microfiche
Silver 16mm - 2.5mil
Silver 16mm - 5mil
Silver 35mm - Direct/Positive
Silver 35mm - Print/Negative
TSL USE ONLY-DO NOT SELECT - Obsolete Media Types

What is selected here tells the SRC imaging department the size for the finished imaging product.

- **Diazo-Microfiche:** Created medium is Diazo, fiche.*
- **Diazo 16mm-2.5mil**:** Created medium is Diazo, 16mm-2.5mil film.*
- **Diazo 16mm-5mil**:** Created medium is Diazo, 16mm-5mil film.*
- **Diazo 35mm-5mil**:** Created medium is Diazo, 35mm-5mil film.*
- **Flash Drive/USB:** Created medium is uploaded to portable flash drive or USB thumb drive.
- **FTP Link:** Created medium is saved to File Transfer Protocol (FTP) Link.
- **Silver-Microfiche:** Created medium is silver gelatin (or silver halide) fiche.
- **Silver 16mm-2.5mil**:** Created medium is silver gelatin (or silver halide) 16mm-2.5mil film.
- **Silver 16mm-5mil**:** Created medium is silver gelatin (or silver halide) 16mm-5mil film.
- **Silver 35mm-Direct/Positive:** Created medium is silver gelatin (or silver halide) 35mm Direct filmed as an identical image.
- **Silver 35mm-Print/Negative:** Created medium is silver gelatin (or silver halide) 35mm Print filmed as a negative or opposite-appearing image.
- **TSL USE ONLY-DO NOT SELECT - Obsolete Media Types:** Do not select this, it is used as a record of media types TSL no longer uses.

* **Diazo is not eligible for SRC storage.**

** **1 mil = 0.001 of an inch film thickness**

The amount of images on a reel of film depends on the film size and the images' position:		
FILM SIZE	LANDSCAPE	PORTRAIT
16mm-2.5mil**	Up to 3,000 images	Up to 6,000 images
16mm-5mil**	Up to 1,250 images	Up to 2,500 images
35mm	Up to 600 images	Up to 1,200 images

Note: Landscape image is horizontal, wider than tall. Portrait image is vertical, taller than wide.

How this field looks when completed:

*What product size is TSL imaging creating?: Silver 16mm - 5mil

Imaging Production: Create a Work Order for SRC Imaging

Beginning File

Beginning File:

The **Beginning File** is composed of the first item in the first container. The information on the file tab represents what is entered in this field. The only restriction: Do not use a Pipe symbol | as part of the Agency Box #. The Pipe symbol is used as a delimiter when exporting information. Do not press the Enter/Return key on the keyboard.

Data Example: Adams, Michael

Ending File

Ending File:

The **Ending File** is composed of the last item in the final container. If it is the same as the beginning file, enter SAME in this field. The only restriction: Do not use a Pipe symbol | as part of the Agency Box #. The Pipe symbol is used as a delimiter when exporting information. Do not press the Enter/Return key on the keyboard.

Data Example: Ybarra, Julio

Imaging Production Process Only

Imaging Production Process
Only: ☐

Click once on this checkbox if the SRC imaging department is to process the reel of microfilm.

How these fields look when completed:

Beginning File:

Ending File:

Imaging Production Process
Only: ☐

Imaging Production: Create a Work Order for SRC Imaging

Duplicate

Duplicate:

No

Yes

Select **No** if duplicates of what is being produced are not needed and go to **Addition**.

Select **Yes** if duplicates of what is being produced are needed, then complete the next two fields.

Number of Duplicates:

Number of Duplicates: The number of duplicates to be created by the SRC imaging department as the final product.

Type of Duplicate:

Diazo 16mm - 2.5mil

Diazo 16mm - 5mil

Diazo 35mm - 5mil

Microfiche

Silver 16mm - 2.5mil

Silver 16mm - 5mil

Silver 35mm - Direct/Positive

Silver 35mm - Print/Negative

Type of Duplicate: What type of duplicate will the SRC imaging department create as the final product? See **What product size is TSL imaging creating?** (Page 152) for descriptions.

Addition

Addition:

No

Yes

Addition: If images are being added to an existing reel of microfilm, select **Yes**. If there is no addition, select **No**. Use the **Notes or Brief Project Description** field to list the documents being added if **Yes** is selected.

BOXYBIT *This is used only when images are to be added an existing reel of microfilm. Images are not added to existing microfiche jackets.*

How these fields look when completed:

Duplicate:

Number of Duplicates:

Type of Duplicate:

Addition:

Document Preparation

Document Preparation:

Document Preparation: Enter information here if the Source Documents being provided require any fee-based preparation by the SRC imaging department such as:

- Removing staples, paper clips, binder clips, and other fastening materials.
- Separating documents from folders, binders, books, or notebooks.
- Trimming glue or other adhesives from documents.

Data Example: Please remove staples from stapled documents and remove from binders.

Notes or Brief Project Description

Notes or Brief Project Description:

Notes or Brief Project Description is a catch-all field to provide the client an opportunity to include anything that might not be included in the fields on this form. This is also where the **Addition** information is provided. Any character can be used except for the Pipe symbol. Do not press the Enter/Return key on the keyboard.

Data Example: Please notify me when filming is complete. I will arrange delivery. Paper boxes are to be sent to SRC storage.

Legal Holds

The **Legal Holds** section is not used for Imaging Production, please disregard this section. The software does not allow this section to be hidden during this process.

Legal Holds: Legal Holds selected: 0

Selected Legal Holds

Page 1 | Jump to Page:

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
Legal Holds						
Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	
Search	Clear	(Rollover for Current Search)		Switch		
Page 1 Jump to Page: Go The search found 0 Legal Holds						
Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	

How these fields look when completed:

Document Preparation:

Notes or Brief Project Description:

Legal Holds: Legal Holds selected: 0

Selected Legal Holds

Page 1 | Jump to Page:

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
Legal Holds						
Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	
Search	Clear	(Rollover for Current Search)		Switch		
Page 1 Jump to Page: Go The search found 0 Legal Holds						
Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	

Imaging Production: Create a Work Order for SRC Imaging

Completed: Create Imaging Production:

[Home](#)
[Preferences](#)
[Reports](#)
[Requests](#)
[Admin](#)
[Dashboard](#)
[Help](#)
[Print](#)
0:19:15
[Logout](#)

Create Imaging Production

[Cancel](#)
[Set Defaults](#)
[Save & Close](#)
[Save & View](#)
[Save & New](#)

Fields marked with an * are required.

*Imaging Production Barcode:

*Organization:

Agency Name
 Search Here:

Division Name

Business Unit Name

Business Sub-Unit Name

Organization Quick Description

Current Search: Find all Organization where **Division Name** Contains 'North'.

Page 1 | Jump to Page: [Go](#) The search found 1 Item

Organization Quick Description
Texas Big State Agency - 988 - North - -

Records Series:

Organization Quick Description
 Search Here:

AIN

RSIN

Record Series Title

Event Code

Years

Current Search: Find all Records Series where **AIN** Contains '54'.

Page 1 | Jump to Page: [Go](#) The search found 1 Item

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Remarks
Texas Big State Agency - 988 - - -	54		Computer Inventory / Telephone Records	AC	40			AC=Computer Install date or phone billing date	

*Contact Name:

*Contact Phone Number (and extension):

Created Item(s) will be stored at the SRC: ☐

Source Item(s) will be stored at the SRC: ☒

*Number of Items Being Sent:

*What is being sent to TSL imaging to be imaged?:

Source Item(s) in storage at the SRC: ☐

If Source Item is stored at the SRC, how many will TSL imaging use?:

Agency Reel Number Range / Box Number Range / Item Barcode(s):

*Earliest File Date:

*Latest File Date:

*What product type is TSL imaging creating?:

*What product size is TSL imaging creating?:

Beginning File:

Ending File:

Imaging Production Process Only: ☐

Duplicate:

Number of Duplicates:

Type of Duplicate:

Addition:

Document Preparation:

Notes or Brief Project Description:

Legal Holds:

[Select All](#)
[Remove All](#)
 Legal Holds selected: 0

Selected Legal Holds

Page 1 | Jump to Page: [Go](#)

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
Legal Holds						
Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	

Search Clear (Rollover for Current Search) Switch

Page 1 | Jump to Page: [Go](#) The search found 0 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
-----------	-----------	-------------	-----------	--------------------------	------------------------

Imaging Production: Create a Work Order for SRC Imaging

Save Options

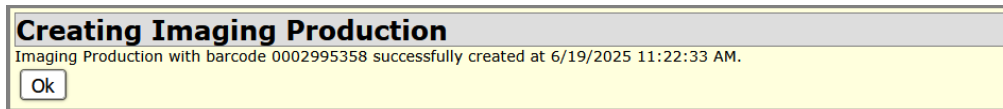


When the fields are complete, the next step is to **Save** the information.

These options are located at the Create Imaging Production screen's top right:

- **Cancel:** Click once to cancel the create process for the Imaging Production. It will not be saved.
- **Set Defaults:** Do not click Set Defaults. Selecting this can compromise the Create process.
- **Save & Close:** Click once to save if:
 - There are no items to pickup at the agency to complete the Imaging Production and source items are already in storage at the SRC.**OR**
 - Save & New has been selected for additional Imaging Productions, this is the last Imaging Production, and Request Pickup needs to be done for items at the agency after searching on the home page.**OR**
 - There are items at the agency that need to go to the SRC but Request Pickup will be done later.
- **Save & View:** Click once to save if this is the only Imaging Production to be completed and a Request Pickup needs to be completed for items at the agency.
- **Save & New:** Click once to save and to create another Imaging Production.

Creating Imaging Production information



The create progress bar will display; if the above information does not appear, an error message appears at the top of the screen. Correct the error and click the appropriate save option.

When the above message appears, it includes the Imaging Production Barcode that was generated for this Imaging Production. The barcode number is the unique identification number applied to each item created in Gimmal. Click once on **Ok**.

Then, if selected:

- **Save & Close:** The Imaging Production has been saved in Gimmal and the Imaging Production home page appears. Save & Close is used when the items to complete the Imaging Production are already in storage at the SRC or it is not time to complete a request for the SRC to pick up items to complete the Imaging Production request. When the items are ready to be picked up by a driver from the SRC, continue to Page 158 to find the Imaging Production in Gimmal that begins the process to create a request for the SRC to pick up the items from the agency.
- **Save & View:** View Imaging Production is the screen to review the Imaging Production just created and is saved in Gimmal. Continue to the last item on Page 159 (**After clicking Save & View: Select Pickup to SRC**) if the SRC driver needs to pick up the Imaging Production item(s).
- **Save & New:** Another Create Imaging Production screen appears. Some fields carried forward from the previous Imaging Production created but all fields are editable.

BOXYBIT *If no items need to be picked up by the SRC from the agency, this process is complete after clicking **Save & Close**.*

Imaging Production: Create a Work Order for SRC Imaging

Request Pickup for Imaging Production Source Documents at the agency

After clicking Save & Close: Find Imaging Production for items at the agency

The screenshot shows the Gimmal Imaging Production screen. Red arrows and numbers indicate the following steps:

- 1. Click on the **Imaging Production** tab.
- 2. Enter search terms into any of the **Quick Search** fields (Agency Name, Division Name, Contact Name, Create Date, Created By Description).
- 3. Click on the **Search** button.
- 4. Click on the **Search** button in the dropdown menu.
- 5. Click on the **Search Fields** option in the dropdown menu.

1. Click once on the item type tab for **Imaging Production**.
 2. Enter search terms into any of the **Quick Search** fields to find the Imaging Production.
 3. Click once on **Search** and if the needed result populates in the grid, continue to **Search results**, select the item (Page 159).
- OR**
4. Click once on **Search**.
 5. Click once on **Search Fields** and continue below.

Search for Imaging Production screen

The screenshot shows the **Search for Imaging Production** screen. A red arrow points to the **Execute** button in the top right corner.

Imaging Production Barcode:

Organization:

Search Here: Agency Name Division Name Business Unit Name Business Sub-Unit Name Organization Quick Description

Current Search: Search

Records Series:

Search Here: Organization Quick Description AIN RSIN Record Series Title Event Code Years

Current Search: Months Days AC Definition Remarks Search

Agency Name:

Division Name:

Business Unit Name:

Sub Business Unit Name:

Contact Name:

Contact Phone Number (and extension):

Enter search information into any fields (including the **Gimmal System Fields** on the bottom half of the screen) to find the Imaging Production needed to create a request pickup for items at the agency. Click once on **Execute**.

Imaging Production: Create a Work Order for SRC Imaging

Search results, select the item

The screenshot shows the Gimmal application interface. At the top, there's a navigation bar with 'Gimmal' logo and various menu items like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. Below this is a sub-navigation bar with tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production (selected), and Records Series. The main area contains a search form with fields for Imaging Production Barcode (0002995358), Organization Quick Description, Agency Name, Division Name, Contact Name, Create Date, and Created By Description. There are Search, Clear, and (Rollover for Current Search) buttons. Below the search form, there's a table of search results. The first result is highlighted, and a red arrow points to its checkbox. The table headers are: Request, Create, View, Search, Export, The Cart. The table data includes: Production Barcode, Current Location, Organization Quick Description, Contact Name, Contact Phone Number (and extension), and What is being sent to TSL imaging to be imaged.

Request	Create	View	Search	Export	The Cart	
☒						
0002995358		Johnny Agency	Texas Big State Agency - 988 - North - -	Johnny Agency	512-555-4567	Hard Copy

Regardless of the Search method used on Page 158, this is the next screen. Click once on the checkbox for the Imaging Production item.

Request Pickup to SRC

The screenshot shows the Gimmal application interface. At the top, there's a navigation bar with 'Gimmal' logo and various menu items like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. Below this is a sub-navigation bar with tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production (selected), and Records Series. The main area contains a search form with fields for Imaging Production Barcode (2995358), Organization Quick Description, Agency Name, Division Name, Contact Name, Create Date, and Created By Description. There are Search, Clear, and (Rollover for Current Search) buttons. Below the search form, there's a table of search results. The first result is highlighted, and a red arrow points to its checkbox. The table headers are: Request, Create, View, Search, Export, The Cart. The table data includes: Production Barcode, Current Location, Organization Quick Description, Contact Name, Contact Phone Number (and extension), and What is being sent to TSL imaging to be imaged.

Request	Create	View	Search	Export	The Cart	
☒						
0002995358		Johnny Agency	Texas Big State Agency - 988 - North - -	Johnny Agency	512-555-4567	Hard Copy

After clicking the checkbox for the Imaging Production item:

1. Click once on **Request**.
2. Click once on **Pickup to SRC** and turn to **Request Pickup** (Page 160).

After clicking Save & View: Select Pickup to SRC

The screenshot shows the Gimmal application interface. At the top, there's a navigation bar with 'Gimmal' logo and various menu items like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. Below this is a sub-navigation bar with tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production (selected), and Records Series. The main area contains a search form with fields for Imaging Production Barcode (0002995358), Organization Quick Description, Agency Name, Division Name, Contact Name, Create Date, and Created By Description. There are Search, Clear, and (Rollover for Current Search) buttons. Below the search form, there's a table of search results. The first result is highlighted, and a red arrow points to its checkbox. The table headers are: Request, Create, View, Search, Export, The Cart. The table data includes: Production Barcode, Current Location, Organization Quick Description, Contact Name, Contact Phone Number (and extension), and What is being sent to TSL imaging to be imaged.

Request	Create	View	Search	Export	The Cart	
☒						
0002995358		Johnny Agency	Texas Big State Agency - 988 - North - -	Johnny Agency	512-555-4567	Hard Copy

To start the pickup process for Imaging Production items that are at the agency:

1. Click once on **Request**.
2. Click once on **Pickup to SRC** and turn to **Request Pickup** (Page 160).

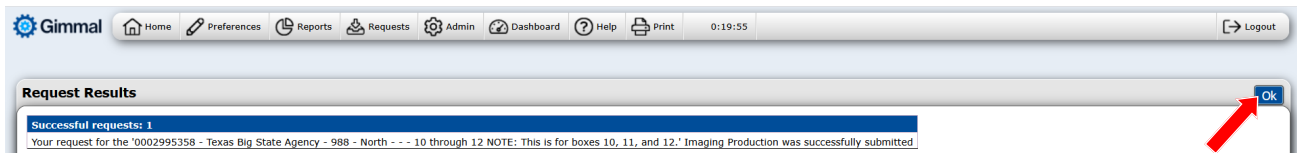
Request Pickup

The screenshot shows the 'Request Pickup' form in the Gimmal system. The form includes a navigation bar at the top with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. The main form area has a header with 'Request Pickup' and buttons for 'Cancel' and 'Request Pickup'. Below this is a table with columns: Update, Record Description, Current Location, Home Location, and Destination. The table contains one row with a record ID '0002995358' and a description 'Texas Big State Agency - 988 - North - - - 10 through 12 NOTE: This is for boxes 10, 11, and 12.' Below the table is a section for 'Individuals' with fields for Barcode, User Name, First Name, Last Name, Address, and Email. There is also a 'Comments' field at the bottom. Numbered callouts 1 through 10 are placed over various elements: 1 points to the 'Page 1' indicator; 2 points to the 'Apply' button; 3 points to the 'Record Description' column; 4 points to the 'Current Location' column; 5 points to the 'Home Location' column; 6 points to the 'Destination' column; 7 points to the 'Individuals' tab; 8 points to the 'Comments' field; 9 points to the 'Cancel' button; and 10 points to the 'Request Pickup' button.

1. **Page Information:** This displays how many screen pages the requested pickup items appear. The maximum is 10 items per page. All items on all pages will be processed with this request.
2. **Change Destination:** APPLY buttons are not used. **Disregard these buttons.**
3. **Record Description:** The barcode, Organization, and sending container information.
4. **Current Location:** The Current Location defaults to the person who created the new item(s) in Gimmal or to the person who received the item(s) as a delivery from the SRC
5. **Home Location:** The Home Location  Location Masked is shown to hide secure information.
6. **Destination:** The Destination  Location Masked is shown to hide secure information.
7. **Individuals tab:** This function is not used for pickup items. **Disregard the Individuals tab.**
8. **Comments:** Type **NEW ACCESSION** if this is a pickup request for an item that has not been stored at the SRC (no SRC label appears on the item). Also use this field to provide additional information for the SRC driver or if a specific pickup date is needed. See Page 161 to use this field to have the item(s) picked up for someone else.
Rush Pickup: For a Rush pickup (10 items or less), enter RUSH PICKUP in this field then call the SRC Circulation Desk 512-475-5155 after the request is submitted to let the SRC know a Rush Pickup is in the system. The request deadline for same-day Rush Pick Up is 2p.m. **This incurs additional fees.** For fees, please see the *Storage Fee Schedule and Imaging-Digital Fee Schedule*: <https://www.tsl.texas.gov/slr/storage>
To take item(s) to the SRC: If the item(s) will be taken to the SRC by an agency employee instead of having the SRC driver make the pickup, include a note about this in the Comments field and call the SRC Circulation Desk 512-475-5155 to make the arrangement.
9. **Cancel button:** Click once to cancel this request and return to the home page.
10. **Request button:** Click once on **Request Pickup** when this screen is complete.

Imaging Production: Create a Work Order for SRC Imaging

Request Results



Confirmation that the Imaging Production pickup request has been submitted to the SRC imaging department. Click once on **Ok**.

To review requests submitted, click **Requests** at the top of the screen then click the link for tab for the request. This is user specific, requests submitted by other users are not seen.

To cancel any Request, call the SRC Circulation Desk: 512-475-5155.

Imaging Production: Create a Work Order for SRC Imaging

NOTES

[illegible]

Supplemental Information:

Gimmel Glossary

AC Definition: This field provides the meaning for AC in the Event Code column to determine Drive Date.

Accessioned: Billing tool activated when an item first arrives into the SRC. This is a checkbox for items on the Boxes and Microforms tabs.

Action Buttons: The dropdown menus on each Home Page Grid below the Quick Search section.

Addition: The process to add more information to an existing reel of film. Additions are not completed for microfiche in the SRC imaging department.

Alternate Fulfillment Method: When requesting delivery, the Alternate Fulfillment Method is a dropdown menu to designate a delivery as Permanent Withdrawal, Rush Delivery, Scan On Demand (Files and Microforms Only), or View or Receive Item(s) at SRC.

Asterisk (*): In Gimmel, this is used to identify a required field. If the field is not completed, the page cannot be processed when the Save option is selected.

Barcode: The unique identification number assigned to everything created in Gimmel.

Boxes item type tab: The item type tab used for everything associated with boxes in Gimmel.

BoxyBit: Helpful tips in the Instruction Guide to give more information for what is provided in the previous instruction.

Bulk Update: This is used to update the same information for a group of items. Only the fields completed will bulk update.

Bundle: A small collection of microfiche jackets using the same Organization and Record Series Title that have been manually separated from a large amount of microfiche jackets. Each bundle is created as its own container in Gimmel. A good rule of thumb when creating a bundle is to keep the number of microfiche jackets at 200 or less. Each bundle is assigned a Reel Number by the agency employee when creating the bundle Gimmel.

Carry Forward: This is when some fields completed during Create are brought forward to a new data entry screen when using Save & New or when creating a new item based on an existing item.

Cart: A place in Gimmel to gather items for an individual Item Type tab that will be used at a later time for a request or another purpose. The cart is tab-specific and does not prohibit other clients from seeing or requesting items.

Create & Update: The Action Button to create and update items in Gimmel.

Creating information dialogue box: This message appears when any item is created in Gimmel. The information begins with a progress bar and the resulting information explains how many items were created. If a single item is created, the Barcode for that item appears.

Dashboard: A pop-up screen that shows items assigned to the client as well as their open requests that have not been processed, yet. Preferences are also be found here in addition to the Preferences option in the Navigation Menu. Do not edit any Preferences fields except for the field that controls the number of items in the Home Page Grid (Records per page limit).

Date Offset is used to bulk update the Earliest File Date, Latest File Date, or Drive Date field for a number of boxes or microforms by a specific number of years (or months or days).

Delivery from SRC: This is used to request delivery from the SRC to an agency.

Disaster Recovery item type tab: The item type tab used for boxes in the Disaster Recovery Vault at the SRC.

Drive Date: The Drive Date is a required field used by Gimmel in conjunction with the retention period (Event Code, Years, Months, Days) to calculate the Eligible Destruction Date. Drive Date begins the countdown to disposition for non-permanent items.

Supplemental Information: Gimmal Glossary

Duplicate: On the Imaging Production tab, this is an identical reproduction of an existing reel of microfilm or a microfiche jacket. On the Search Action Button, this is a way to search for duplicate information in Gimmal.

Eligible Destruction Date: The earliest date when an item can be disposed either at the agency or processed through destruction at the SRC. Eligible Destruction Date is calculated by Gimmal using the Drive Date and the Retention Period fields (Years, Months, Days) for a specific Record Series Title from the Record Series section.

Event Based: Determining the Drive Date begins with this field. Event based is a series of acronyms used as part of the retention period fields for a Record Series Title. The acronyms are: AC, after close; AV, administratively valuable; CE, calendar year end; FE, fiscal year end; FF, federal fiscal year end; LA, life of asset; PM, permanent; US, until superseded. N/A in the Event Code field means there is no acronym for this Record Series. This replaces the Retention Code field with no data on the Retention Schedule.

Export: The Action Button to export items out of Gimmal text-based worksheet.

Fiche Circulation item type tab: The item type tab used to request delivery and request pickup for individual microfiche jackets pulled from a complete microfiche bundle.

Files item type tab: The item type tab used for files in Gimmal.

Gimmal: The software used by the Texas State Library's SRC to help state agency clients access their storage inventories at the SRC, see their agency's Records Retention Schedule, request deliveries from the SRC, request pickup items to be sent to the SRC, and submit work orders for the SRC imaging department.

Gimmal System Fields: Fields on the lower half of the View screen for an item that are used to identify the metadata for an item.

Help: This is found at the top of each Gimmal page. Click here to go to the area of Gimmal where training materials are found as well as other Gimmal resources.

History: Found under the View Menu, History is a roadmap that details each time an action was performed upon the item from creation (or when older items were migrated to the former TexLinx system in 2015) up to the last time the item was updated or a request was completed.

Home Page Grid: This shows the inventory that exists in Gimmal for searched items assigned to that item type tab. Items seen are limited to the client's role permissions.

Imaging Production item type tab: The item type tab used to create and view work orders for the imaging department at the SRC.

ISNOTNULL: Is Not Null. This is used in Search to find items when the field is not empty.

ISNULL: Is Null. This is used in Search to find items when the field is empty.

Item Type Tabs: The tabs Boxes, Files, etc. that are assigned to the client based upon the permissions assigned by the agency's Records Management Officer/Records Management Liaison.

Jacket: A single sheet of microfiche contains many images of microfilm sliced and inserted into microfiche jackets. Oftentimes a jacket or a group of jackets are inserted into a paper folder as a safeguard to protect the information in the jacket. A small collection of jackets is known as a bundle.

Key Word Search: A search function for each Item Type Tab that allows the client to select a field and enter a word or phrase into a field to search that tab for information in that field.

Supplemental Information: Gimmel Glossary

Logout: Logout is found at the top right corner of the Navigation Menu. The client should always click once on Logout at the end of each session or when leaving the screen idle for an extended period of time.

Microfiche: A microfiche jacket contains many images of microfilm sliced and. Oftentimes a jacket or a group of jackets are inserted into a paper folder as a safeguard to protect the information in the jacket. A small collection of jackets is known as a bundle that is created as a single container on the Microforms item type tab in Gimmel.

Microforms: In Gimmel, Microforms is the umbrella term for microfilm and microfiche. It is also the reference source in Fiche Circulation to identify the microfiche bundle from where microfiche jackets were pulled in the SRC prior to delivery to the agency.

Microforms item type tab: The item type tab used for microfilm reels and microfiche bundles in Gimmel.

Mil: This is a unit of measurement for microfilm thickness. 1 mil = 0.001 (1/1,000th) of an inch. Microfilm reels have a film thickness of 2.5 mil or 5 mil.

Navigation Menu: The Gimmel screen top area starting with Home and ending with Logout.

Number of Fiche Pulled: The number of microfiche jackets pulled for a Fiche Circulation request. The SRC employee completes this field.

Number of Pulls: This field is used for billing in Fiche Circulation. The SRC employee completes this field.

Organization: Organization consists of agency name and, when applicable: division name, business unit name, and business sub-unit name. RMO/RML may revise Organization email by contacting a Gimmel administrator at the SRC.

Permanent Withdrawal: An Alternate Fulfillment Method option for request delivery. Permanent Withdrawal (also known as Permanent Transfer) is selected when an item is being delivered from the SRC and will not return to the SRC — this will end billing for the item the month the item is delivered. Selecting this option incurs an additional fee. Do not select this for delivery of files from a box, Disaster Recovery boxes, or microfiche jackets that are part of but not the complete bundle of microfiche.

Permissions: Rights assigned to a Role for all Gimmel clients.

Pickup to SRC: This is used to request pickup from an agency to the SRC.

Pipe Symbol: A vertical line | used as a delimiter during Export and when formatting an excel worksheet. The Pipe Symbol is created by holding down SHIFT on the keyboard and pressing the \ key. Do not used the Pipe symbol for any Gimmel data field.

Preferences: Depending upon the permissions a client has been granted by the agency's Records Management Officer or Records Management Liaison, there may be many options here. But everyone who has a Gimmel username can go here to adjust how many items that are viewable in any home page grid. To do this, click the Home Page icon and complete the field for "Records per page limit". No other fields for Preferences should be edited. This can also be done on the Preferences tab in Dashboard.

Query: Fields use equations to generate a search for a specific tab.

Quick Search: Search fields arranged horizontally, usually found between the Item Type Tabs and the Action Buttons or within the Organization and Record Series sections of a Create or Update screen.

Supplemental Information: Gimmel Glossary

Records Management Liaison (RML): The individual assigned by an agency's Records Management Officer or the agency head to act as an assistant to or on behalf of the Records Management Officer. This Role has the same responsibilities as a Records Management Officer.

Records Management Officer (RMO): The individual assigned by an agency head to be the person responsible for all records management responsibilities at the agency.

Records Series item type tab: The item type tab for the agency's retention schedule in Gimmel.

Request: The dropdown Action Button used to request Pickup to SRC or Delivery from SRC.

Rights: Each Role has a list of rights (permissions) that allow clients assigned to that Role to work in Gimmel. These rights are under the control of a Gimmel administrator at the Texas State Library.

Role: Role permissions determine what the individual sees and does in Gimmel. The agency's Records Management Officer or Records Management Liaison determines the role for each employee.

Rush: When a delivery or pickup is to be expedited prior to the next regular delivery or pickup (10 items or less). For Rush Delivery from the SRC, select Rush in Alternate Fulfillment Method on the Request Items screen. For a Rush Pickup to the SRC, the Alternate Fulfillment Method is not available on the Request Pickup screen; instead, type RUSH PICKUP in the Comments field. Rush incurs additional fees. The request deadline for rush is 2p.m. Call the SRC Circulation Desk 512-475-5155 when a rush request is submitted.

Save & Close: This is used in the Create screens and is used when the client is not ready to submit a Pickup to SRC request or it is used after a client has data entered information for a final item after creating a series of items using Save & New.

Save & New: This is used after a client has data entered an item and wants to create another item. Some fields may carry forward.

Save & View: This is used after creating a single item to review the information entered and/or to make a Pickup to SRC request.

Search & Replace: An edit option found under Create & Update in the Action Buttons. This allows a client to search within a number of items and replace an exact term or phrase with another term or phrase for all of the items found or selected.

Set Defaults: This is an unnecessary option on the Create screen for Boxes, Files, Disaster Recovery, Microforms, and Imaging Production. Do not use Set Defaults. Using Set Defaults can compromise the Create process for a client. A Gimmel administrator clears Set Defaults each month.

SRC: The Texas State Library and Archive Commission's State Records Center building on Shoal Creek Boulevard in Austin, Texas. Items requested in Gimmel are processed through the SRC or at the satellite facility in Southeast Austin.

Time Out: When a client is logged in to Gimmel and leaves the screen idle for an extended period of time, time out occurs once the timer at the top of the screen expires. There are a limited number of software licenses available in Gimmel so it is recommended all clients Log Out when finished for each session. Time out can sometimes occur without warning due to an unknown issue.

Unaccessioned: An item that has not been received into the SRC, no monthly billing events occur for unaccessioned items. The accessioned checkbox is not selected.

Update: This is used from the Create & Update dropdown Action Button to correct or modify information for an item that appears in Gimmel.

View: Action Button to see an item on the tab or to see the History for the item.

Supplemental Information: Gimmel Glossary

NOTES

[illegible]

Supplemental Information: Gimmel Glossary

NOTES

[illegible]

Supplemental Information: Search

To search, use the Quick Search fields at the top of each item type tab screen or activate the Search Fields option under the Search action button

Unless instructed otherwise, do not use spaces when using search symbols.

Use the Search key to search without using any parameters:

Click the **Search** button in the Quick Search area to search for all items on that tab.

To search for a single item:

Type the information into any number of Quick Search fields in the top section of an item type tab (Boxes, Files, Disaster Recovery, Microforms, etc.) or into any fields in the Search screen found in the Search and View dropdown menu. The more search fields used, the more narrow the result.

To search for a series of items:

> is used to search for items greater than the search item.

Example: >500 searches for items greater than 500, not including 500.

< is used to search for items less than the search item.

Example: <500 searches for items less than 500, not including 500.

>= is used to search for items matching and greater than the search item.

Example: >=500 searches for 500 and items greater than 500.

<= is used to search for items matching and less than the search item.

Example: <=500 searches for 500 and items less than 500.

<> is used to search for a range or as an exception.

Examples: To find all containers numbered 500 to 775, enter: >=500<=775

<>12 in the Agency Box# field will search for all boxes not including 12 in that field.

To search for a non-consecutive set of items:

Use **OR** between the terms with a space on each side of **OR**.

Example: to search for non-consecutive container numbers 600, 603, 611, and 815; enter:

600 OR 603 OR 611 OR 815

BOXYBIT *Since the Box Number and Reel Number fields are designed as text fields and not numeric fields, searching for a specific container number or a range of container numbers may not yield desired results. Searching for 12 will find 12, 125, 912, 1123, and any other .*

Duplicates Search

Search for **Duplicates** using the Search Action Button.

Find duplicate Boxes based on the following selected fields

Column Name
☐ AC Definition
☐ Accessioned
☐ Agency Box Number
☐ Agency Name
☐ AIN
☐ Archival
☐ Archive Date
☐ Beginning File
☐ Box Barcode
☐ Box Quick Description
☐ Box Size
☐ Business Unit Name
☐ Create Date
☐ Created By Barcode
☐ Created By Description
☐ Current Location Barcode
☐ Current Location Item Type ID
☐ Current Location Quick Description
☐ Days
☐ Deleted
☐ Division Name
☐ Drive Date
☐ Earliest File Date
☐ Eligible Destruction Date
☐ Ending File
☐ Event Code
☐ Hold Retention
☐ Hold Retention Comments
☐ Home Location Barcode
☐ Home Location Item Type ID
☐ Home Location Quick Description
☐ Hub Location Barcode
☐ Hub Location Item Type ID
☐ Hub Location Quick Description
☐ Is at Archive Location
☐ Is At Home
☐ Is Missing
☐ Label Printed
☐ Label Printed Date
☐ Last Modified By Barcode
☐ Last Modified By Description
☐ Last Modified Date
☐ Last Transferred By Barcode
☐ Last Transferred By Description
☐ Last Transferred Date
☐ Latest File Date
☐ Legacy Notes
☐ Legacy Tracking Number
☐ Legal Citations
☐ Locked Down
☐ Months
☐ Notes
☐ Organization Quick Description
☐ Printed By User Barcode
☐ Printed By User Description
☐ Record Series Title
☐ Records Series
☐ RSIN
☐ Sub Business Unit Name
☐ TSLAC Analyst
☐ Years

Limit Boxes by the following criteria

Existing Queries Query Name Scope

Column	Operator	Criteria	Logic	Sort Type	Sort Order
☐	☐		And ☐	☐	
☐	☐		And ☐	☐	
☐	☐		And ☐	☐	
☐	☐		And ☐	☐	
☐	☐		And ☐	☐	

[Query Empty Items](#)

[Query Empty Items](#)

[Query Empty Items](#)

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Select any number of checkboxes to the left of the field names. Use the Query section at the bottom to narrow the search even more. See the section about **Advanced Query Search** (Page 172) for more information. Click **Execute** at the top right to run the search.

BOXYBIT The three *Query Empty Items* that appear at the bottom of the Boxes and Microforms Duplicate Search screens are known by Gimmal as a non-working issue. Please disregard these options.

Supplemental Information: Search

Key Word Search

Search using **Key Word Search** using the **Search Action Button**.

Box Key Word Search

Select Fields to Search

☒ Column Name
☐ AC Definition
☐ Agency Box Number
☐ Agency Name
☐ AIN
☐ Archival
☐ Beginning File
☐ Box Barcode
☐ Box Quick Description
☐ Box Size
☐ Business Unit Name
☐ Created By Barcode
☐ Created By Description
☐ Days
☐ Division Name
☐ Ending File
☐ Event Code
☐ Hold Retention Comments
☐ Hub Location Barcode
☐ Hub Location Item Type ID
☐ Hub Location Quick Description
☐ Label Printed
☐ Last Modified By Barcode
☐ Last Modified By Description
☐ Last Transferred By Barcode
☐ Last Transferred By Description
☐ Legacy Notes
☐ Legacy Tracking Number
☐ Legal Citations
☐ Locked Down
☐ Months
☐ Notes
☐ Organization Quick Description
☐ Printed By User Barcode
☐ Printed By User Description
☐ Record Series Title
☐ Records Series
☐ RSIN
☐ Sub Business Unit Name
☐ TSLAC Analyst
☐ Years

Enter Text to Search:

Cancel Execute

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Click the checkbox(es) on the left to select the field(s) then use the data field to type the key word to search. Click **Execute** at the top right to run the search.

Advanced Query Search

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Using Query from the Search action button

This is a more complex search tool.

Disregard the checkbox on the left side of the screen.

Column: Identifies the field found on that tab to perform the search.

Operator: The action to be used (see below chart).

Criteria: Search information is entered/selected here.

Logic:

Using **AND**: Line 1 = A and Line 2 = B – records where Line 1 = A and Line 2 = B would be returned – both fields would have to match.

Using **OR**: Line 1 = A and Line 2 = B – records where Line 1 = A or Line 2 = B would be returned.

Sort Type:

Ascending means the lowest search result appears at the top of the grid

Descending means to highest search result appears at the top of the grid

Disregard the field **Sort Order**.

=	EXACT
Between	RANGE
>	GREATER THAN
<	LESS THAN
>=	GREATER THAN OR EQUAL
<=	LESS THAN OR EQUAL
><	GREATER THAN AND LESS THAN
In	List of exact values, separated by commas
NotIn	Omit list of exact values, separated by commas
IsNotNull	Field contains any data
IsNull	Field contains no data
Like	Field Contains, using % characters to wrap the criteria
NotLike	Field Does Not Contain, using % characters to wrap criteria

BOXYBIT The three **Query Empty Items** that appear at the bottom of the Boxes screen are known by Gimmel as a non-working issue. Please disregard these options.

Click **Execute** at the top right to run the search.

Supplemental Information: Search

NOTES

[illegible]

Supplemental Information: Search

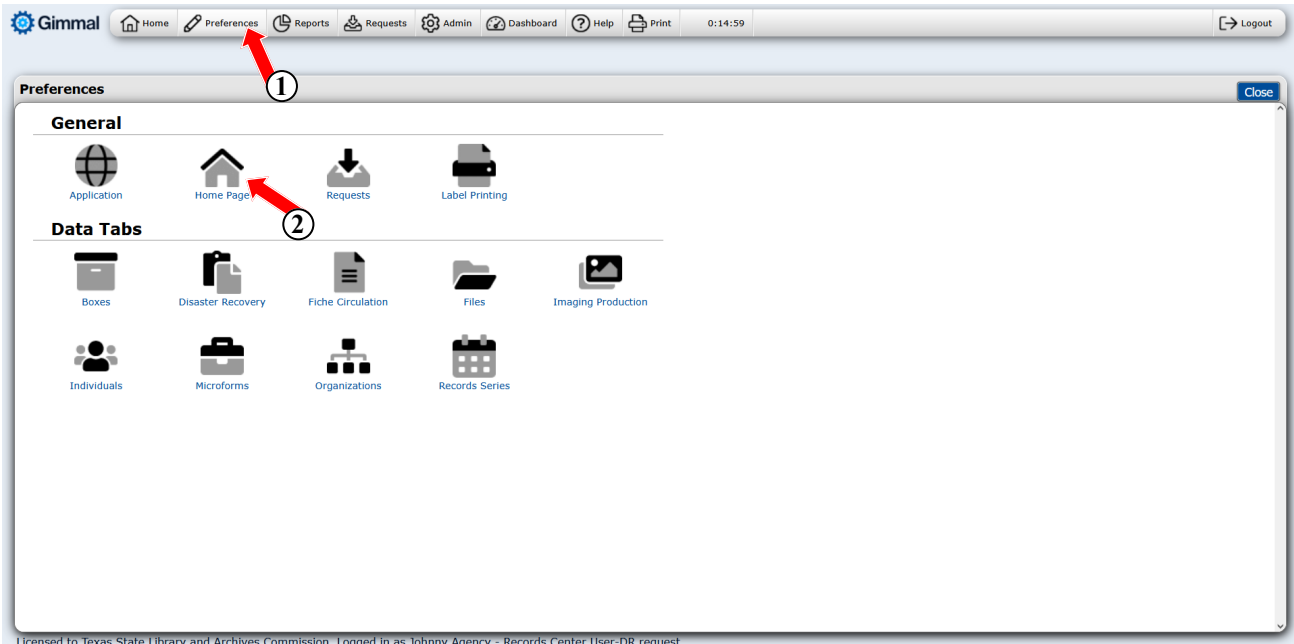
NOTES

[illegible]

Supplemental Information:

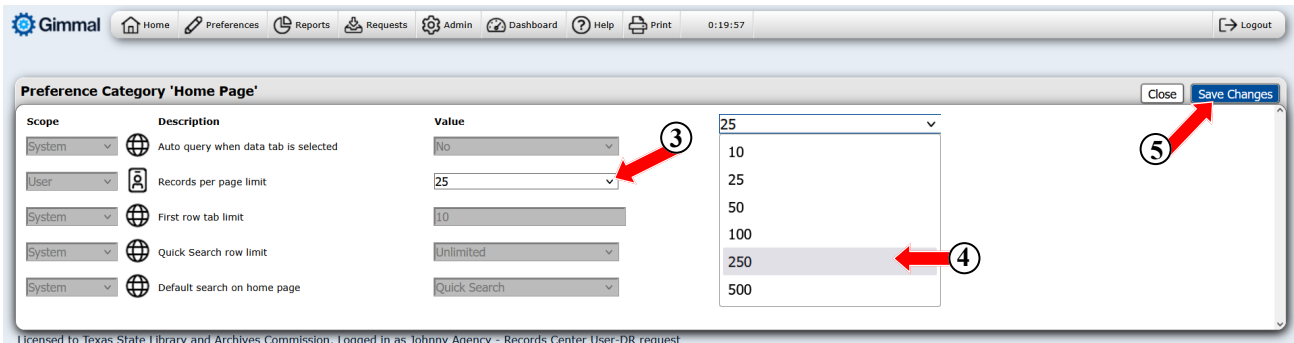
Preferences: Number of items on home page

To adjust the number of items that appear in the home page grid for the Item Type Tabs , Home Page is where that is done on the Preferences tab either at the top of the screen or in **Dashboard** (see *Supplemental Information: Dashboard*, Page 181).



To adjust the number of home page grid rows:

1. Click once on **Preferences** at the top of the screen in the Navigation Menu.
2. Click once on **Home Page**.



Edit the number that appears in the field for **Records per page limit**. Click once (3) on the down arrow. A preset group of numbers shows in the dropdown menu; in the menu, click once (4) on the new setting from the list, then click once (5) on **Save**. The number selected will be the total rows that will appear on each page of the home page grid for each Item Type Tab. The grayed fields are not editable.

BOXYBIT *It is okay to temporarily use a large amount in this field, but always return to this page to adjust the amount relatively low (25 or 50 is recommended) so as not to impede the speed for search results loading on the home page or when moving between pages or tabs.*

Supplemental Information: Preferences: Number of items on home page

NOTES

[illegible]

Supplemental Information: Alternate Fulfillment Method

Request Items

Page 1 | Jump to Page: Go

Record Description	Off-site Vendor
Remove 0002565769 - 2	(None)

Enter, scan, or click the Search button to specify the desired destination:
Johnny Agency
0000774385

Individuals

Individuals Barcode User Name First Name Last Name Address Email

Role

Search Clear (Rollover for Current Search) (Rows Hidden) Switch

Page 1 | Jump to Page: Go The search found 0 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email	Role
---------------------	-----------	------------	-----------	---------	-------	------

Comments:

Alternate Fulfillment Method:

- Permanent Withdrawal
- Rush Delivery
- Scan On Demand (Files and Microforms only)
- View or Receive Item(s) at SRC

Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request

Alternate Fulfillment Method is an optional tool when completing a Request Delivery. Billing for the container will end the month the Permanent Withdrawal request is fulfilled.

Click the dropdown menu to make a selection:

- Permanent Withdrawal:** Selected when an item is being delivered from the SRC and will not be returned to the SRC. **Selecting this incurs a Permanent Withdrawal fee.** If it is determined after the item is delivered (without Permanent Withdrawal) that the item will not be returned to the SRC, please send an email to the SRC Manager (see page 16 for contacts). Permanent Withdrawal is not used for the delivery of:
 - Files.
 - Fiche Circulation (microfiche that amount to part, not all, of a microfiche bundle).
 - Disaster Recovery boxes.
- Rush Delivery:** This is selected when up to 10 items need to be delivered from the SRC immediately. **Selecting this option incurs a Rush fee.**
Schedule for Rush Delivery: Deadline is 2p.m. for same-day delivery Monday-Friday. After requesting the Rush Delivery, please call the SRC Circulation Desk (512-475-5155) to alert the SRC about this Rush request and to confirm delivery for that same day.
- Scan On Demand (Files and Microforms only):** This is selected when a file or microform needs to be delivered to a state work email address. **Selecting this incurs a Scanning fee.** *Please see Supplemental Information: Scan On Demand for Delivery, (Page 193).*
- View or Receive Item(s) at SRC:** This is selected when the client wants to come to the SRC on Shoal Creek Blvd. to view or receive item(s) for delivery. Provide name and phone number in the comments field. An SRC employee will notify when the items are ready to view or be received for delivery. The Circulation Fees apply but the delivery fee is waived.

Supplemental Information: Alternate Fulfillment Method

NOTES

[illegible]

Supplemental Information: Drive Date

DRIVE DATE IS NOT ELIGIBLE DESTRUCTION DATE.*

The determined Drive Date is used by Gimmal to calculate the Eligible Destruction Date for items assigned to Record Series Titles in Gimmal.

Organization Quick Description	AIN *	RSIN	Record Series Title	Event Code	Years	Months	Days	AC Definition
Texas Big State Agency - 988 - - -	16		Complaint Investigations	CE	75			
Texas Big State Agency - 988 - - -	17		Requests for Printing/Distribution		2			
Texas Big State Agency - 988 - - -	18		Computer Inventory -- Prior to 2020	AC	10			AC=Computer install date
Texas Big State Agency - 988 - - -	19		Disaster Assistance Pay Summaries	FE	50			
Texas Big State Agency - 988 - - -	20		Monthly Payments Received for Postage	AC	3	6		AC=End of month

Look to the Event Code column** in Gimmal for the Record Series Title selected in the Records Series section to use the below chart to determine the Drive Date.

EVENT CODE column is	Drive Date
AC AC = After Close	The Drive Date is the Close Date*** as defined in the AC Definition column.
CE CE = Calendar Year End	The Drive Date is December 31 of the Calendar Year for the Latest File Date. <i>Example: Latest File Date: 10/15/2024, Drive Date is 12/31/2024</i>
FE FE = Fiscal Year End	The Drive Date is August 31 of the Fiscal Year for the Latest File Date. <i>Examples: Latest File Date: 10/15/2024, Drive Date is 08/31/2025</i> <i>Latest File Date: 03/31/2025, Drive Date is 08/31/2025</i>
N/A Event Code is empty	The Drive Date is the same as the Latest File Date.
PM PM = PERMANENT	The Drive Date is the Close Date*** for the records. There is no disposal date for Permanent records; a Drive Date is still required in case the Retention values are changed in the future.
AV AV = Administratively Valuable	The Drive Date is when the records are no longer administratively valuable unless identified as a later date on the Retention Schedule.
FFE FFE = Federal Fiscal Year End	The Drive Date is September 30 of the Federal Fiscal Year for the Latest File Date. <i>Example: Latest File Date is 12/15/2024, Drive Date is 09/30/2025</i>
LA LA = Life of Asset	The Drive Date is when the life of the asset has expired for the item unless identified as a later date on the Retention Schedule.
US US = Until Superseded	The Drive Date is when the item has been superseded unless identified as a later date on the Retention Schedule.

*The only time the Drive Date is the same as the Eligible Destruction Date is when no information is in Years, Months, and Days columns.

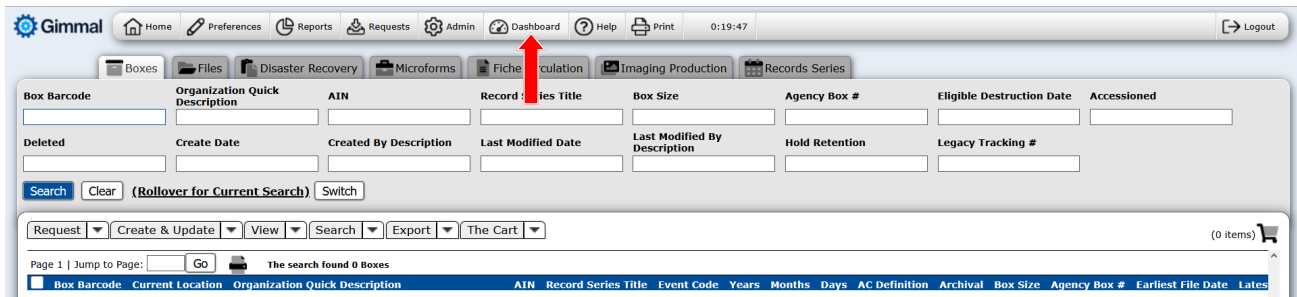
**On the printed Retention Schedule, the column is labeled Retention Code.

***Close Date is the date when records are deemed to be no longer active at your agency.

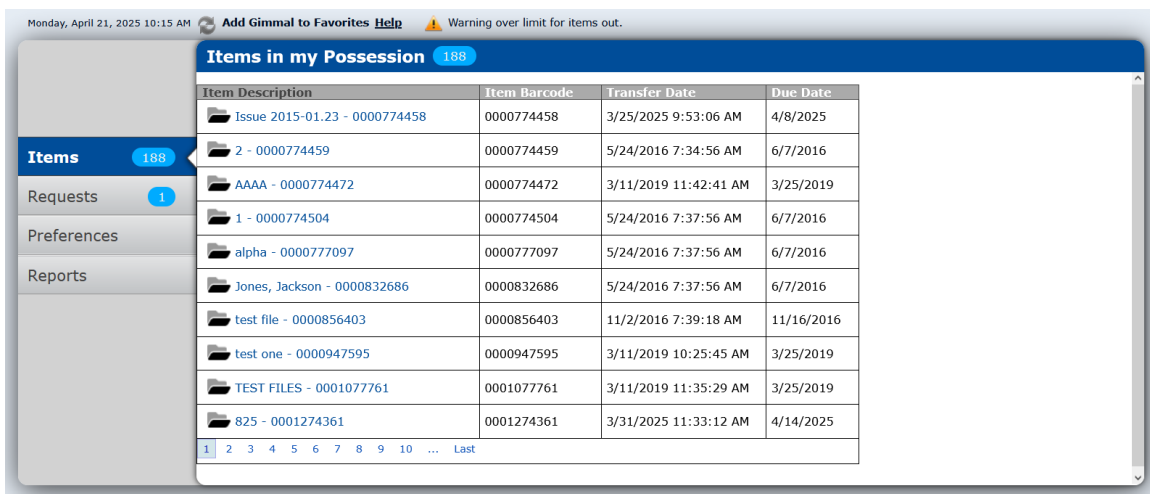
NOTES

[illegible]

Supplemental Information: Dashboard



Dashboard is a Gimmal interface where a client can see: Items assigned to their Gimmal account, open requests, preferences, and reports. Click **Dashboard** in the Navigation menu at the top of the screen.



A pop-up screen opens with four side tabs:

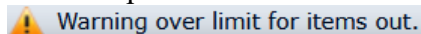
- **Items**
- **Requests**
- **Preferences**
- **Reports**

The active side tab appears as selected with a white arrow pointing left indicating the information showing on the screen is for that side tab. Inactive side tabs appear as gray.

The symbols used in **Items** and **Requests** identify the type of item:

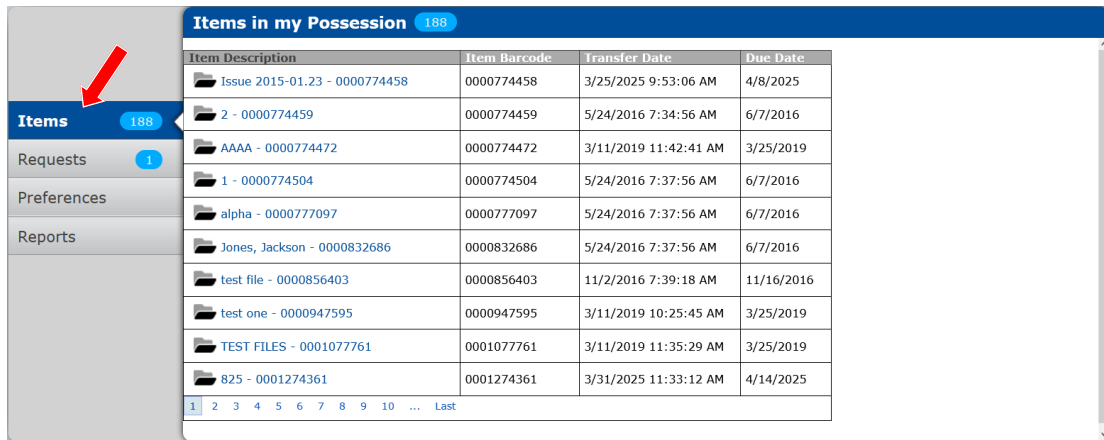


Disregard this message if it is seen at the top of the screen:



This pertains to a setting in Gimmal. The SRC does not follow time or quantity limits regulations.

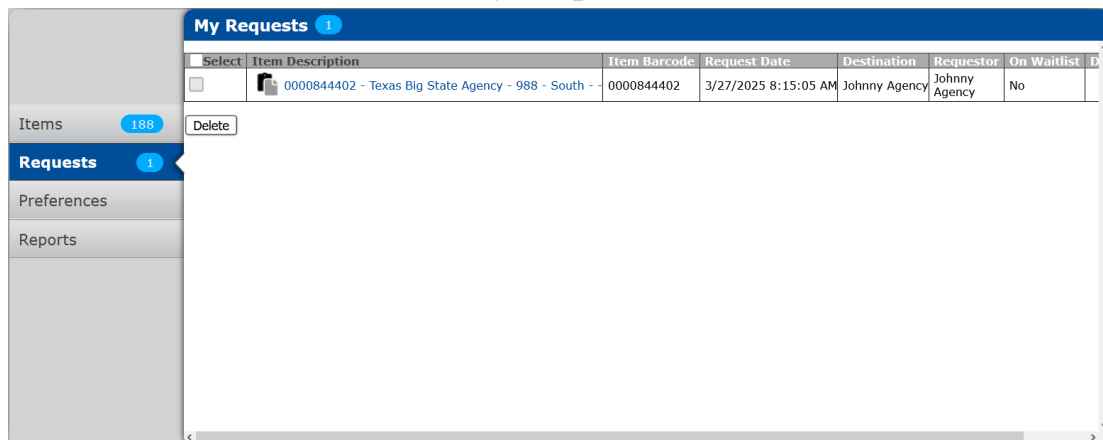
Items in my Possession



Item Description	Item Barcode	Transfer Date	Due Date
Issue 2015-01.23 - 0000774458	0000774458	3/25/2025 9:53:06 AM	4/8/2025
2 - 0000774459	0000774459	5/24/2016 7:34:56 AM	6/7/2016
AAAA - 0000774472	0000774472	3/11/2019 11:42:41 AM	3/25/2019
1 - 0000774504	0000774504	5/24/2016 7:37:56 AM	6/7/2016
alpha - 0000777097	0000777097	5/24/2016 7:37:56 AM	6/7/2016
Jones, Jackson - 0000832686	0000832686	5/24/2016 7:37:56 AM	6/7/2016
test file - 0000856403	0000856403	11/2/2016 7:39:18 AM	11/16/2016
test one - 0000947595	0000947595	3/11/2019 10:25:45 AM	3/25/2019
TEST FILES - 0001077761	0001077761	3/11/2019 11:35:29 AM	3/25/2019
825 - 0001274361	0001274361	3/31/2025 11:33:12 AM	4/14/2025

Click once on **Items** to see **Items in my Possession**. These items were delivered to the client from the SRC or have been created by the client in Gimmal and not yet received into the SRC. Anything on this list is assigned to the client in **Current Location**. The number on the tab is how many items are assigned to the client in Gimmal. Click the link text under **Item Description** to open the **View** screen for the item.

My Requests



Select	Item Description	Item Barcode	Request Date	Destination	Requestor	On Waitlist
☐	0000844402 - Texas Big State Agency - 988 - South -	0000844402	3/27/2025 8:15:05 AM	Johnny Agency	Johnny Agency	No

Click **Requests** to see **My Requests**. This shows open requests the client submitted through Gimmal. Once a Request is processed at the SRC, the request will disappear from this screen. Another way to see all open requests is to click the **Requests** section in the Navigation Menu. The number on the tab is the total for open requests. Click the link text under **Item Description** to open the **View** screen for the item. The **Delete** button is standard functionality for SRC employees who can delete requests. Customers outside the SRC cannot delete in Gimmal. To cancel a request, turn to **Need help? Contact list for Gimmal assistance** (Page 16).

My User Preferences

My User Preferences	
Application	
Description	Value
Confirmation when creating records	Yes ▾
Confirmation when transferring records	Yes ▾
Home Page	
Description	Value
Records per page limit	25 ▾
Label Printing	
Description	Value
Printed labels expiration limit	1
Individuals	
Description	Value
Display associations column on home page	No ▾
Enable carry forward	Yes ▾
Auto-query on Transfer and Request pages	No ▾
Display contents column on home page	No ▾
Files	
Description	Value
Enable carry forward	Yes ▾
Default current location	0000774385

The only information the client may want to edit on this screen is the field **Records per page limit**. Edit this field to change the number of rows of information that appear in the home page grid for every tab in Gimmel then click once on **Save**. The process for this is also done by making the adjustment using the Preferences in the Navigation Menu. See **Supplemental Information: Preferences: Number of items on home page** (Page 175).

BOXYBIT It is best not to make any other changes in the Preferences section of Dashboard. Changing any other data fields (**Default Current Location**, **Default Home Location**, **Default Request Destination**) on this screen may result in delivery / pickup problems. So, as a rule, please do not change any information on this screen other than the field **Records per page limit**.

My Reports

My Reports	
View Report as:	PDF ▾ Add/Remove
Max Rows	900000

Reports that are run frequently can be added to this section. Click once on **Add/Remove**.

Supplemental Information: Dashboard

Reports

The screenshot shows the Gimmal Reports interface. At the top is a navigation bar with links: Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. The 'Reports' link is active. Below the navigation bar is a 'Reports' window with a 'Close' button. Inside the window, there is a 'Search User Reports' section with filters for Start Date, Completed Date, Status, Report Name, Description, and No Data. Below this is a 'View Report as: PDF' dropdown. The main section displays a list of reports under the heading 'Max Rows 900000'. The reports are organized into three categories: Contents, Items Out, and General. Each category has a table with columns: Action, Name, Description, and Dashboard. In the 'Contents' category, the 'Box File Contents' report is shown. In the 'Items Out' category, reports for 'Boxes Out', 'Disaster Recovery Out', 'Fiche Circulation Out', 'Files Out', and 'Microforms Out' are listed. In the 'General' category, the 'Activity Summary' report is shown. A red arrow points to the 'Add' button in the 'Dashboard' column of the 'Box File Contents' report.

Action	Name	Description	Dashboard
View Filter	Box File Contents	This report shows a list of the Files that are located in Boxes	Add

Action	Name	Description	Dashboard
View Filter	Boxes Out	This report shows all Boxes that are not in their Home Location	Add
View Filter	Disaster Recovery Out	This report shows all Disaster Recovery that are not in their Home Location	Add
View Filter	Fiche Circulation Out	This report shows all Fiche Circulation that are not in their Home Location	Add
View Filter	Files Out	This report shows all Files that are not in their Home Location	Add
View Filter	Microforms Out	This report shows all Microforms that are not in their Home Location	Add

Action	Name	Description	Dashboard
View	Activity Summary	This report shows a summary of activity by item type, date, or action	Add

Click once on **Add** in the **Dashboard** column for any reports that need to be added to the Dashboard's Reports section. Another way to see and use Reports is to click Reports in the Navigation menu at the top of the screen.

The screenshot shows the Gimmal Reports interface, similar to the previous one. However, in the 'Items Out' category, the 'Boxes Out' report is highlighted. A red arrow points to the 'Remove' button in the 'Dashboard' column of this report. The other reports and the 'General' category remain the same.

Action	Name	Description	Dashboard
View Filter	Boxes Out	This report shows all Boxes that are not in their Home Location	Remove
View Filter	Disaster Recovery Out	This report shows all Disaster Recovery that are not in their Home Location	Add
View Filter	Fiche Circulation Out	This report shows all Fiche Circulation that are not in their Home Location	Add
View Filter	Files Out	This report shows all Files that are not in their Home Location	Add
View Filter	Microforms Out	This report shows all Microforms that are not in their Home Location	Add

Action	Name	Description	Dashboard
View	Activity Summary	This report shows a summary of activity by item type, date, or action	Add

When Reports are added to the Dashboard section, the **Dashboard** column will display as **Remove**.

Reports– With added report

Items188

Requests1

Preferences

Reports

My Reports

View Report as:PDFAdd/Remove

Max Rows900000

Items Out	
Action	Name
ViewFilter	Boxes Out

This is how the **My Reports** section of Dashboard looks when a report is available.

Supplemental Information: Dashboard

NOTES

[illegible]

Supplemental Information: Change Gimmel Password

This section explains the following processes:

- A. Request a password change (below)
- B. Required password change (below)
- C. Reset the password before the required password change (please see Page 188).

A. Request a password change

If the password has been forgotten or if the account is locked, please send an email to gimmel@tsl.texas.gov to request a password reset. Requests are not auto-replied. A Gimmel administrator will send the password. Requests sent after hours or on weekends will be replied on the next business day during regular office hours.

B. Required password change

Enter new password

Confirm new password

Login

! You are required to create a new password. Please enter a new password into the password field and click the Login button again.

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Once every 90 days, the client is required to change the password. After logging in to Gimmel, the above screen will show.

Password requirements are:

- Between 8 and 32 characters
- At least one number
- At least one uppercase letter
- At least one lowercase letter

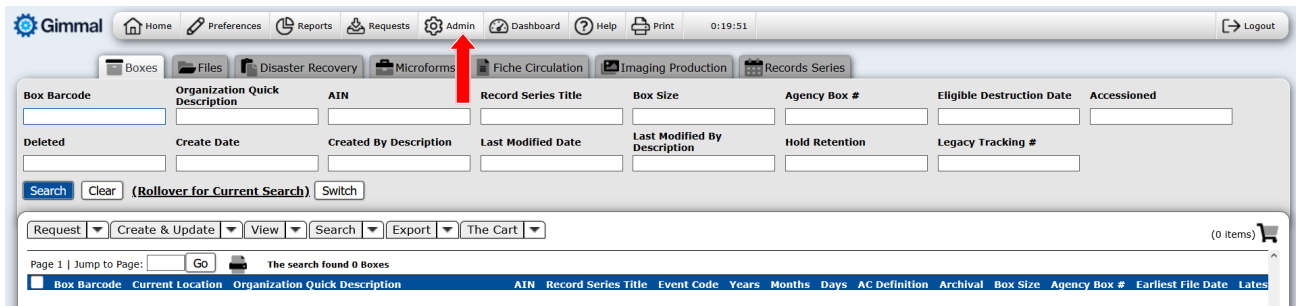
Symbol characters are not required within the password but they can make the password stronger.

1. Enter the **New password**.
2. Retype the new password to **Confirm new password**.
3. Click once on **Login**. This process is complete.

Remember the new password.

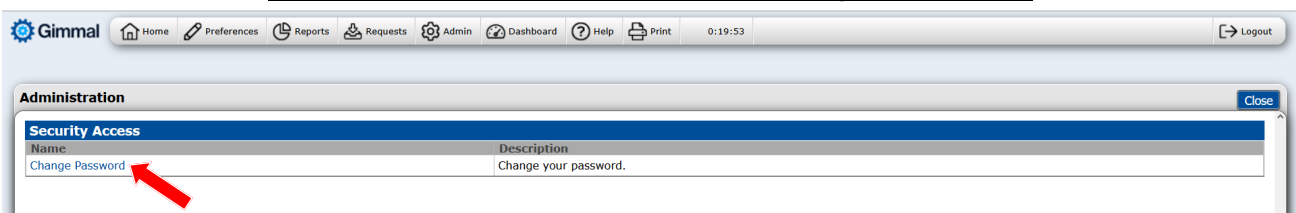
Supplemental Information: Change Gimmal Password

C. Reset the password before the required password change



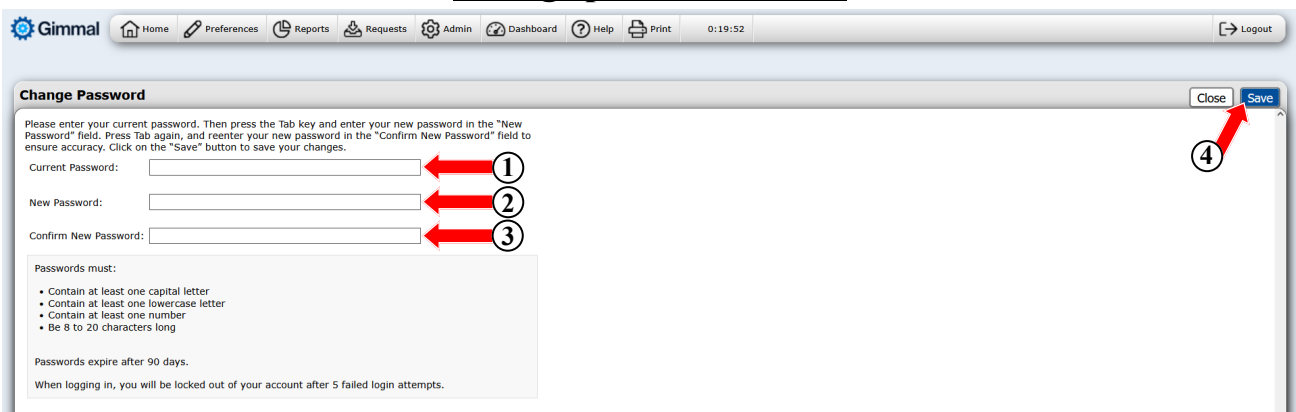
Gimmal requires clients to change their password on a regular schedule. However, if the password needs to be changed at any time, click once on **Admin** in Navigation Menu at the top of the screen.

Administration screen: Select Change Password



Click once on **Change Password** to begin the process. Permissions limit what is viewed here.

Change password screen



Password requirements are:

- Between 8 and 32 characters
- At least one number
- At least one uppercase letter
- At least one lowercase letter

Symbol characters are not required within the password but they can make the password stronger.

To change the password:

1. Enter the **Current Password**.
2. Enter the **New Password**.
3. Retype the new password to **Confirm New Password**.
4. Click once on **Save**. This process is complete.

Remember the new password.

Supplemental Information: Change Gimmel Password

NOTES

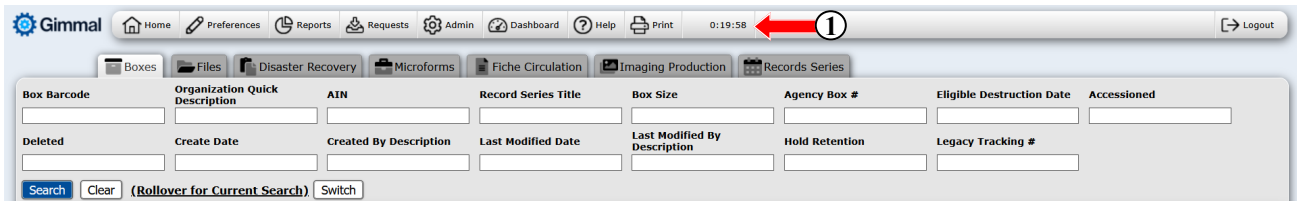
[illegible]

Supplemental Information: Change Gimmel Password

NOTES

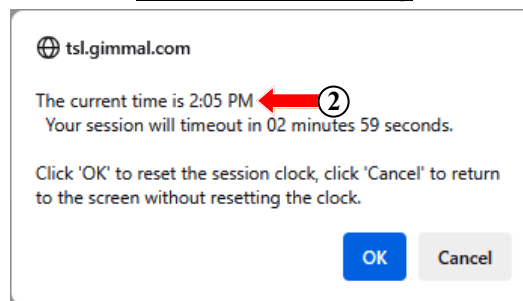
[illegible]

Supplemental Information: Timer



At the top of each Gimmal screen is a timer (1) that tells how much time is left before timing out.

Timeout warning



A reminder pop-up message appears when there is a remaining time of 3 minutes in the session before timing out. The “current time” (2) is when the warning posted.

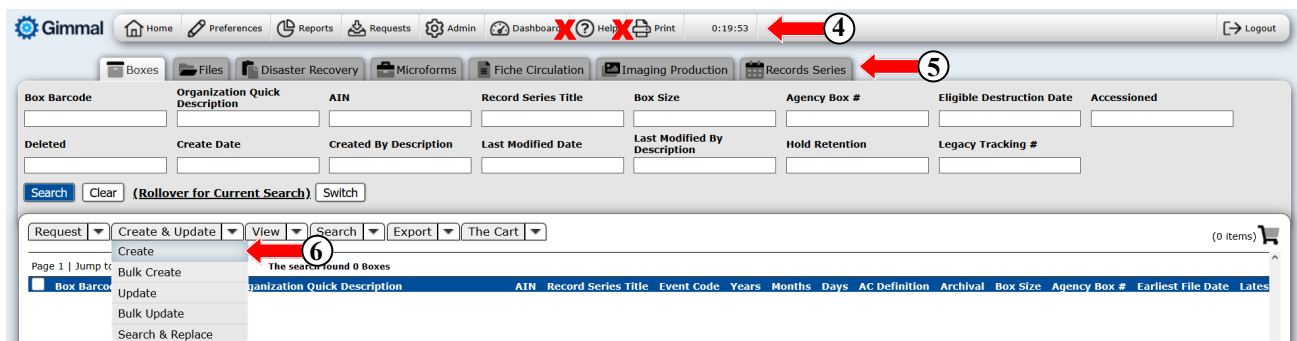
URGENT: Manually reset the timer

*Records Series: 38 - Transmittals - Original

Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years
Search Here:					
Months	Days	AC Definition	Remarks		
Current Search: Find all Records Series where Organization Quick Description Contains '988'.					
(3) Search Clear					
Page 1 [2] [3] [4] [5] [6] Jump to Page: Go The search found 54 Items					
Organization Quick Description	AIN	RSIN	Record Series Title	Event Code	Years
☒ Texas Big State Agency - 988 -	38	Transmittals - Original	AC	3	AC=Latest page date
☐ Texas Big State Agency - 988 -	02	Client Questionnaire	N/A	8	

Sometimes, timeout might occur without notification. Getting timed out doesn't always happen but sometimes, it does. Work efficiently, but be prepared. There is a way to reset the timer before getting a timeout warning: Click once (3) on **Search** in the Records Series section.

BOXYBIT *Do not click a radio button in the Organization section to reset the timer, this will clear Record Series.*



Another way is to make a section (not Dashboard or Help) in the Navigation Menu (4). Or, on home page, select an Item Type tab (5), or an Action Button option (6) to go to another screen.

Supplemental Information: Timer

NOTES

[illegible]

Supplemental Information:

Scan On Demand for Delivery

Scan On Demand is a request process for a file, microfilm image, or microfiche jacket that is sent to the agency destination in an email rather than having the item physically delivered to the agency from the SRC. One benefit for this process is there is no need to return the item to the SRC once the client no longer needs access to the item. The procedure follows the usual request process but the Comments field and Alternate Fulfillment Method on the Request Items screen are used. Instructions follow for file(s), microfilm image(s), and microfiche image(s).

Scan On Demand requests are completed by the SRC in the order received. For information about the request, please call the SRC Circulation Desk, 512-475-5155.

Scan On Demand: File(s)

To request Scan On Demand for a file in storage at the SRC, follow the instructions for ***Request Delivery from the SRC: Files*** (beginning on Page 115).

The screenshot shows the Gimmal web interface. At the top is a navigation bar with links: Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and a Logout button. The main content area is titled 'Request Items' and includes a 'Cancel' and 'Request' button. Below this is a table with one row: 'Remove' and '8 - 0000774465'. A search section follows with a text input field containing 'Johnny Agency' and '0000774385', and a 'Search' button. Below the search section is a table with columns: 'Individuals Barcode', 'User Name', 'First Name', 'Last Name', 'Address', and 'Email'. The table is empty. Below the table is a 'Comments' field with the text 'johnny.agency@tbsa.texas.gov' and a red arrow pointing to it labeled '1'. Below the comments field is an 'Alternate Fulfillment Method' dropdown menu with a red arrow pointing to it labeled '2'. The dropdown menu is open, showing four options: 'Permanent Withdrawal', 'Permanent Withdrawal and Delete', 'Scan On Demand (Files and Microforms only)', and 'View or Receive Item at SRC'. A red arrow points to the third option, labeled '3'.

In the **Comments** field (1), type the **work email address** where the scanned file will be sent. Scans cannot be sent to a personal email address like Yahoo or Gmail.

Click once (2) on the **Alternate Fulfillment Method** dropdown menu. Click once (3) on **Scan On Demand (Files and Microforms only)**.

At this point, return to Page 119 (files that exist in Gimmal) or Page 123 (files that don't exist in Gimmal) for the remaining instructions for ***Request Delivery from the SRC: Files***.

BOXYBIT This is a fee-based process. If staple removal or other technical processes need to be done for the file to scan, there will be an additional fee for Document Preparation. For the fees schedules, please see: <https://www.tsl.texas.gov/slrn/storage>
To cancel any Request or for more information, call the SRC Circulation Desk: 512-475-5155.

Scan On Demand: Microfilm Image(s)

Request Items

Page 1 | Jump to Page: Go

Record Description
Remove 0000774365 - 1

Enter, scan, or click the Search button to specify the desired destination:

Johnny Agency
0000774365

Individuals Boxes

Individuals Barcode User Name First Name Last Name Address Email

Search Clear (Rollover for Current Search) (Rows Hidden) Switch

Page 1 | Jump to Page: Go The search found 0 Individuals

Individuals Barcode	User Name	First Name	Last Name	Address	Email
---------------------	-----------	------------	-----------	---------	-------

Comments:
johnny.agency@tbsa.texas.gov - images A868, B033, and C107

Alternate Fulfillment Method:

- Permanent Withdrawal
- Permanent Withdrawal and Delete
- Scan On Demand (Files and Microforms only)
- View or Receive Item at SRC

Licensed to Texas State Library and Archives Commission, Logged In as Johnny Agency - Records Center User-DR request

To request Scan On Demand for the specific image(s) on a reel of microfilm in storage at the SRC, follow the instructions ***Request Delivery from the SRC: Boxes, Disaster Recovery, Microfilm Reels, and Microfiche Bundles*** (beginning on Page 107) to request delivery. Then, complete the Comments field for Scan On Demand:

In the **Comments** field (1):

- Type the **work email address** where the scanned image(s) will be sent. Scans cannot be sent to a personal email address like Yahoo or Gmail.
- List the image(s) to be scanned.

Click once (2) on the **Alternate Fulfillment Method** dropdown menu. Click once (3) on **Scan On Demand (Files and Microforms only)**.

At this point, return to ***Request Delivery from the SRC: Boxes, Disaster Recovery, Microfilm Reels, Microfiche Bundles & Files*** (Page 112) for the remaining instructions.

BOXYBIT This is a fee-based process. There may be an additional fee for Document Preparation. For the fees schedules, please see: <https://www.tsl.texas.gov/slr/storage>
To cancel any Request, call the SRC Circulation Desk: 512-475-5155. For information about fees, please contact the imaging supervisor 512-475-5162.

Scan On Demand: Fiche Circulation for Microfiche Jacket(s)

To request Scan On Demand for microfiche jackets as part of a microfiche bundle in storage at the SRC, follow the instructions for *Request Delivery from the SRC: Fiche Circulation: Microfiche Jackets* (beginning on Page 131) to request delivery.

The screenshot shows the 'Request Items' form in the Gimmal system. At the top, there's a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. Below this, the 'Request Items' window has a 'Cancel' and 'Request' button. The main area shows a table with one record: '0002995359 - Builders Cap 18 2024 Contract'. Below the table, there's a search section with fields for 'Enter, scan, or click the Search button to specify the desired destination:', 'Johnny Agency', and '0000774385'. There are tabs for 'Individuals' and 'Boxes'. Below these are fields for 'Individuals Barcode', 'User Name', 'First Name', 'Last Name', 'Address', and 'Email'. A 'Search' button is present. Below the search fields, it says 'Page 1 | Jump to Page: [] Go' and 'The search found 0 Individuals'. There's a table with headers: 'Individuals Barcode', 'User Name', 'First Name', 'Last Name', 'Address', and 'Email'. Below the table, there's a 'Comments:' field with the text 'johnny.agency@tbsa.texas.gov' and a red arrow pointing to it with a circled '1'. Below the comments field is an 'Alternate Fulfillment Method:' dropdown menu. The dropdown is open, showing options: 'Permanent Withdrawal', 'Permanent Withdrawal and Delete', 'Scan On Demand (Files and Microforms only)', and 'View or Receive Item at SRC'. A red arrow points to the dropdown with a circled '2', and another red arrow points to the 'Scan On Demand (Files and Microforms only)' option with a circled '3'.

In the **Comments** field (1), type the **work email address** where the scanned file will be sent. Scans cannot be sent to a personal email address like Yahoo or Gmail.

Click once (2) on the **Alternate Fulfillment Method** dropdown menu. Click once (3) on **Scan On Demand (Files and Microforms only)**.

At this point, return to *Request Delivery from the SRC: Fiche Circulation: Microfiche Jackets* (Page 141) for the remaining instructions.

BOXYBIT This is a fee-based process. There may be an additional fee for Document Preparation. For the fees schedules, please see: <https://www.tsl.texas.gov/slr/storage>
To cancel any Request, call the SRC Circulation Desk: 512-475-5155. For information about fees, please contact the imaging supervisor 512-475-5162.

Supplemental Information: Scan On Demand for Delivery

NOTES

[illegible]

Supplemental Information: Hold

Sometimes, on the Boxes or Microforms tab in Gimmal, it will be necessary to review items on hold or to place/remove a hold on an item or several items (that are either at the SRC or at the agency). The important function of placing items on hold is that it prohibits the items from being processed through destruction if the items fall within the parameters of any destruction request. Items not on hold will allow them to be found and processed for destruction. This section will explain how to review items on hold and how to add/remove a hold.

There are two options to use to review items on hold:

- **Hold Retention** in the quick search field
- **Search** menu and search data fields on the Search screen

Review items on hold: Use the Hold Retention quick search field

The screenshot shows the Gimmal interface with the 'Boxes' tab selected. The 'Quick Search' section contains several input fields. The 'Hold Retention' field is highlighted with a red circle and a red arrow pointing to it, labeled with a circled '1'. Below the 'Hold Retention' field is a 'Search' button, which is also highlighted with a red circle and a red arrow pointing to it, labeled with a circled '2'. The 'Search' button has a tooltip that says '(Rollover for Current Search) Switch'.

To do this from the home page (or to use the Search screen, turn to Page 198):

- **To review items on hold:** Type **TRUE** in the **Hold Retention** field (1) and click once (2) on **Search**. Continue to Search results (Page 205).
- **To review items not on hold:** Type **FALSE** in the **Hold Retention** field (1) and click once (2) on **Search**. . Continue to Search results (Page 199).

The reason true or false is used because when an item is placed on hold, there is a checkbox for Hold Retention that automatically gets selected when the items is updated (it is seen on the View screen for Boxes and Microforms). Since data is required to be entered into the quick search field for Hold Retention, true means the checkbox is selected, false means the checkbox is not selected.

Review items on hold: Use Search menu

The screenshot shows the Gimmal interface with the 'Boxes' tab selected. The 'Quick Search' section contains several input fields. The 'Search' button is highlighted with a red circle and a red arrow pointing to it, labeled with a circled '1'. Below the 'Search' button is a dropdown menu. The dropdown menu is open, showing options: 'Request', 'Create & Update', 'View', 'Search', 'Export', and 'The Cart'. The 'Search' option is highlighted with a red circle and a red arrow pointing to it, labeled with a circled '2'. The dropdown menu also shows 'Search Fields' and 'Keyword'.

Click once (1) on **Search** dropdown menu the click once (2) on **Search Fields**.

Use Search

Complete any of the fields on the screen to find the item(s) to review for hold (this step is optional, it just narrows down the results to be more specific). Then...

...the field for **Hold Retention** must be completed to find items that are on hold. On the View screen, this field is found in the Gimmal System Fields section and it appears as a checkbox. The selected checkbox means a hold type has been selected, an unselected checkbox means no hold type has been selected. On this Search screen, the field is a True/False dropdown menu. Click once (1) on the arrow for the dropdown menu.

To review items on hold: Click once (2) on **True**, then, click once (3) on the **Execute** button. Continue to **Search results** (Page 205).

To review items not on hold: Click once (2) on **False**, then, click once (3) on the **Execute** button. Continue to **Search results** (Page 199).

Supplemental Information: Hold

Search results for items not on hold

Box Barcode	Current Location	Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	Accessioned
0000844243	Location Masked	Texas Big State Agency - 988 - South - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0000844244	Location Masked	Texas Big State Agency - 988 - South - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0000844245	Location Masked	Texas Big State Agency - 988 - South - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0000866677	Johnny Agency	Texas Big State Agency - 988 - Central - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0000992067	Location Masked	Texas Big State Agency - 988 - East - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RP-48	
0001224168	Johnny Agency	Texas Big State Agency - 988 - East - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0001224674	RoMona Manager	Texas Big State Agency - 988 - South - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0001252555	Location Masked	Texas Big State Agency - 988 - East - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0001252556	Location Masked	Texas Big State Agency - 988 - East - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	

Regardless of the Search method used on either Page 197 or Page 198, search results populate the home page grid (above illustration).

Now, two decisions need to be made: Will one item or multiple items be updated to be placed on hold? What type of hold will be used?

For one item, continue below.

For multiple items, go to Place multiple items on hold: Some or all? (Page 202).

Place a single item on hold

Box Barcode	Current Location	Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	Accessioned
0000844243	Location Masked	Texas Big State Agency - 988 - South - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0000844244	Location Masked	Texas Big State Agency - 988 - South - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0000844245	Location Masked	Texas Big State Agency - 988 - South - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0000866677	Johnny Agency	Texas Big State Agency - 988 - Central - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0000992067	Location Masked	Texas Big State Agency - 988 - East - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RP-48	
0001224168	Johnny Agency	Texas Big State Agency - 988 - East - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0001224674	RoMona Manager	Texas Big State Agency - 988 - South - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0001252555	Location Masked	Texas Big State Agency - 988 - East - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	
0001252556	Location Masked	Texas Big State Agency - 988 - East - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	

It has been determined that the only box to place on hold is the one eligible for destruction. Click once on the checkbox (1) for the item to be updated, click once (2) on **Create and Update**, then click once (3) on **Update**.

Supplemental Information: Hold

Place a single item on hold: Update Box screen

The screenshot shows the 'Update Box 000086677 - 1' screen in the Gimmal system. The 'Legal Holds' section is expanded, showing a table with columns: Quick Description, Hold Code, Hold Name, Hold Status, Hold Type, Authorized By Individual, Released By Individual, Selected Date Time, and Selected By User. The 'Hold Type' field is highlighted with a red arrow and the number 1, and the 'Search' button is highlighted with a red arrow and the number 2. The 'Hold Type' field contains the text 'AGENCY'. Below the table, there is a search bar with the text 'The search found 0 Legal Holds'.

Update Box 000086677 - 1

Accessioned: ☒

Legacy Tracking Number:

Legacy Notes:

Legal Holds:

Select All Remove All Legal Holds selected: 0

Selected Legal Holds

Page 1 | Jump to Page: Go

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	Selected Date Time	Selected By User
				AGENCY				

Legal Holds

Hold Code: Hold Name: Hold Status: Hold Type: Authorized By Individual: Released By Individual:

Search Clear (Rollover for Current Search) Switch

Page 1 | Jump to Page: Go The search found 0 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
-----------	-----------	-------------	-----------	--------------------------	------------------------

Hold Retention: ☐

Hold Retention Comments:

Is Missing: ☐

Scroll down to the **Legal Hold** section. Click once (1) into the **Hold Type** field and type **AGENCY**. Then click once (2) on Search.

Place a single item on hold: Select the hold name

Update Box 000086677 - 1

Legal Holds: Select All Remove All Legal Holds selected: 0

Page 1 | Jump to Page: Go

Quick Description Hold Code Hold Name Hold Status Hold Type Authorized By Individual Released By Individual Selected Date Time Selected By User

Legal Holds

Hold Code Hold Name Hold Status Hold Type Authorized By Individual Released By Individual

Search Clear (Rollover for Current Search) Switch

Page 1 | Jump to Page: Go The search found 7 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
☐ ADMIN	Administrative	Active	Agency		
☐ AUDIT	Audit	Active	Agency		
☐ FISCAL	Fiscal	Active	Agency		
☐ LEGAL	Legal	Active	Agency		
☐ LEGAL - P.I.	Legal - Public Information	Active	Agency		
☐ PEND A.R.	Pending Archival Review	Active	Agency		
☐ PEND A.T.	Pending Archival Transfer	Active	Agency		

Hold Retention: ☐

Hold Retention Comments:

Is Missing: ☐

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Click once on the radio button (1) for any one **Hold Name**. These hold types are open for interpretation based on the agency's understanding and use of these terms. **Select only one.**

Place a single item on hold: Hold Retention Comments

Hold Retention: ☐ (2)

Hold Retention Comments: (3)

The checkbox (2) for **Hold Retention** is not editable, Gimmal will select the checkbox automatically when the box is updated. An optional field to complete (3) is **Hold Retention Comments** to explain why the item is on hold. Once all needed information is entered for this item, click once on **Update** at the top right of the screen. This completes the process to assign a hold for a single item.

Supplemental Information: Hold

Place multiple items on hold: Some or all?

The screenshot shows the Gimmal Records Center interface. At the top, there's a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. Below this is a toolbar with icons for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The main area contains a search form with fields for Box Barcode, Organization Quick Description, AIN, Record Series Title, Box Size, Agency Box Number, Eligible Destruction Date, and Accessioned. There are also fields for Deleted, Create, Created By Description, Last Modified Date, Last Modified By Description, Hold Retention, and Legacy Tracking Number. A search button is labeled 'Search' with a red arrow pointing to it (callout 2). Below the search form is a table of search results. The table has columns: Organization Quick Description, AIN, Record Series Title, Event Code, Years, Months, Days, AC Definition, Archival, Box Size, and Age. There are 9 items found. The first item is selected (checkbox checked) with a red arrow pointing to it (callout 1). The second item is also selected. The third item is not selected. The fourth item is not selected. The fifth item is not selected. The sixth item is not selected. The seventh item is not selected. The eighth item is not selected. The ninth item is not selected. A red arrow points to the 'Create & Update' button (callout 3) and another red arrow points to the 'Bulk Update' button (callout 4). The bottom of the screen shows a license notice: 'Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request'.

Update Some: If some items found are to be placed on hold, click once on the checkboxes on the left side of the grid (1). If items appear on multiple pages (2) turn to **Supplemental Information: Preferences: Number of items on home page** (Page 175) to update the home page grid so all items appear on a single page and repeat the first step to select items. After the items are selected, click once (3) on **Create & Update**, then click once (4) on **Bulk Update**. Continue to **Update Some** (Page 203).

Update All: If all items found are to be placed on hold, do not select any of the checkboxes on the left side of the grid. Click once (3) on **Create & Update**, then click once (4) on **Bulk Update**. Continue to **Update All** (Page 203).

Place multiple items on hold: Bulk Update Boxes screen

UPDATE SOME: Since some checkboxes were selected on the home page grid, the first radio button is selected for the total number of boxes selected in the search results:

The screenshot shows the 'Execute Bulk Updates on Boxes' dialog box. The top navigation bar includes 'Gimmal', 'Home', 'Preferences', 'Reports', 'Requests', 'Admin', 'Dashboard', 'Help', 'Print', and a 'Logout' button. The dialog box has a title bar with 'Execute Bulk Updates on Boxes', 'Cancel', and 'Bulk Update' buttons. Inside, there is a warning section: 'Please keep in mind the following: Although Bulk Updates are recorded in history, they cannot easily be undone. Bulk updates to entire queries should not be performed when other users may be creating or editing data records. Bulk Updates have the potential to consume significant resources. As a result, it is recommended large Bulk Updates be performed during off hours. You may be prevented from bulk updating some data records due to security or due to deletion.' Below this, a section asks 'Please select the range of data records you would like to update:' with two radio buttons. The first radio button, 'Update the 3 Boxes I selected on the previous page', is selected and highlighted with a red arrow. The second radio button is 'Update the 9 Boxes matching my current query criteria'. Below the radio buttons, a note states: 'Because Bulk Updates may take several minutes to execute, please enter your email address to be notified when the Bulk Update is complete.' An email field contains the text 'Johnny.Agency@tbsa.texas.gov'.

UPDATE ALL: Since no checkboxes were selected on the home page grid, the second radio button is selected for the total number of boxes in the search results:

The screenshot shows the 'Execute Bulk Updates on Boxes' dialog box. The top navigation bar is identical to the previous screenshot. The dialog box title bar and warning section are also identical. In the 'Please select the range of data records you would like to update:' section, the second radio button, 'Update the 9 Boxes matching my current query criteria', is selected and highlighted with a red arrow. The first radio button is now unselected. The note about execution time and the email field remain the same.

Place multiple items on hold: Select the hold name

Scroll down the page to the **Legal Holds** section:

Execute Bulk Updates on Boxes

Legal Holds: Action: **Apply** (1) **Select All** **Remove All** Legal Holds Selected: 0

Page 1 | Jump to Page: Go

Quick Description **Hold Code** **Hold Name** **Hold Status** **Hold Type** **Authorized By Individual** **Released By Individual** **Selected Date Time** **Selected By User**

Legal Holds

Hold Code **Hold Name** **Hold Status** **Hold Type** (2) **Authorized By Individual** **Released By Individual**

Search (3) **Clear for Current Search** **Switch**

Page 1 | Jump to Page: Go **The search found 7 Legal Holds**

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
☐ PEND A.T.	Pending Archival Transfer	Active	Agency		
☐ PEND A.R.	Pending Archival Review	Active	Agency		
☐ ADMIN	Administrative	Active	Agency		
☐ AUDIT	Audit	Active	Agency		
☐ LEGAL - P.I.	Legal - Public Information	Active	Agency		
☐ FISCAL	Fiscal	Active	Agency		
☐ LEGAL	Legal	Active	Agency		

Cancel **Bulk Update** (7)

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Do not click (1) the **Action:** dropdown menu. **Apply** is the correct option. Click once (2) into the **Hold Type** field and type **AGENCY**. Then click once (3) on **Search**.

Click once on the radio button (4) for any one **Hold Type**. These hold types are open for interpretation based on the agency's understanding and use of these terms. **Select only one.**

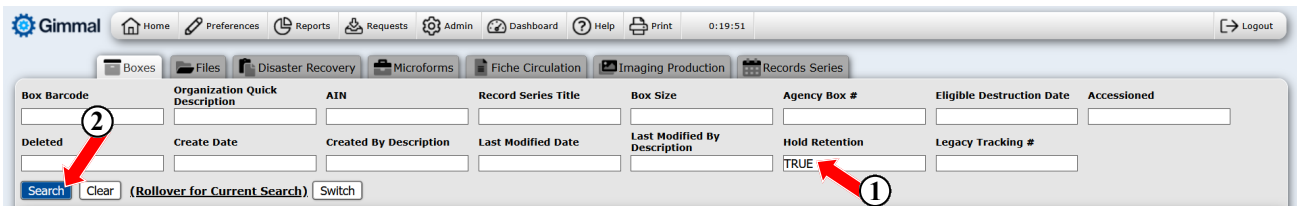
Hold Retention Comments: (5)

(6) ☐ Clear Field Hold Retention Comments

An optional field to complete (5) is **Hold Retention Comments** to explain why the items are on hold. Do not click the checkbox (6) for **Clear Field Hold Retention** Comments. This option is used when removing a hold type during bulk update. Once all information is complete, click once (7) on **Bulk Update**. This ends the process to assign a hold to a group of items. An email will be received when Gimmel completes the updates.

Supplemental Information: Hold

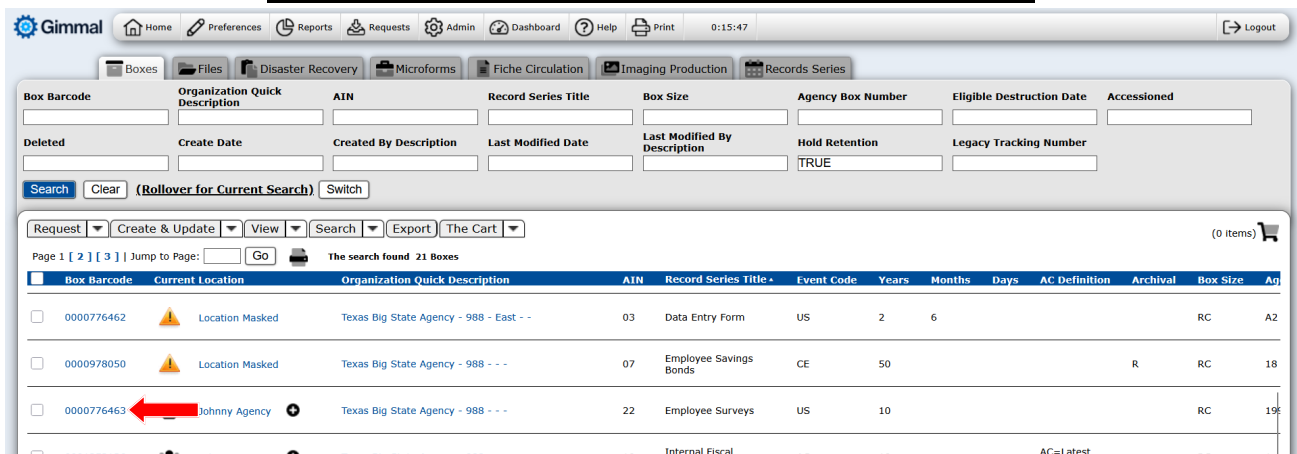
Remove hold: Search for items on hold



The screenshot shows the Gimmal search interface. The 'Hold Retention' field is set to 'TRUE' (indicated by a red arrow and label 1). The 'Search' button is highlighted (indicated by a red arrow and label 2).

To find all items on hold, type **true** in the **Hold Retention** quick search field (1). Other search fields can be completed to make the search more for specific. Click once on the **Search** button (2) when the fields are complete. Continue below to review and remove hold for one item. For more than one item, turn to **Remove hold for multiple items: Update some or update all** (Page 207).

Remove hold for one item: Review items on hold

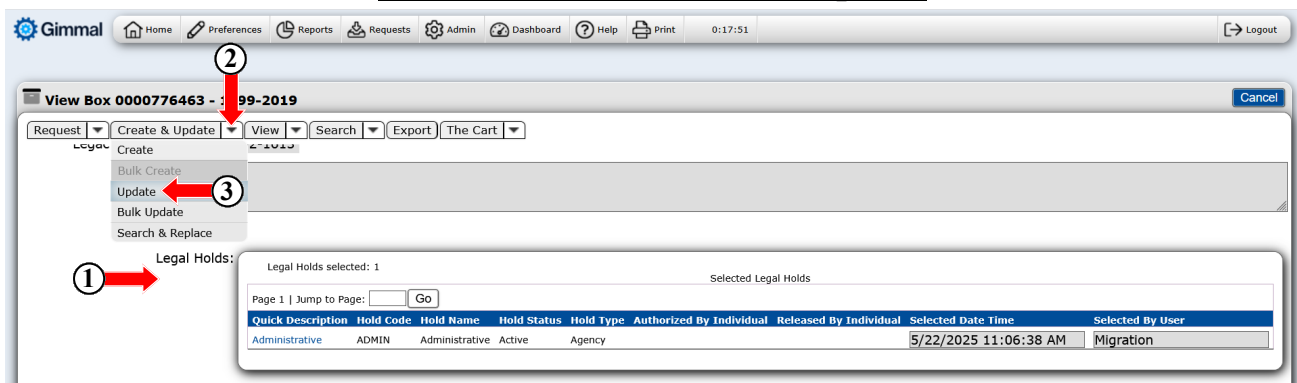


The screenshot shows the Gimmal search results page. The 'Hold Retention' field is set to 'TRUE'. The search results table shows 21 boxes. The first three rows are highlighted with red arrows and labels 1, 2, and 3.

Box Barcode	Current Location	Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	Accession
0000776462	Location Masked	Texas Big State Agency - 988 - East - -	03	Data Entry Form	US	2	6				RC	A2
0000978050	Location Masked	Texas Big State Agency - 988 - - -	07	Employee Savings Bonds	CE	50				R	RC	18
0000776463	Johnny Agency	Texas Big State Agency - 988 - - -	22	Employee Surveys	US	10					RC	19

To review the hold placed on an item, click once on the item's barcode to go to the View Box screen.

Remove hold for one item: Update



The screenshot shows the Gimmal View Box screen. The 'Legal Holds' section is visible. The 'Create & Update' dropdown menu is open, showing the 'Update' option (indicated by a red arrow and label 3). The 'Legal Holds' section shows 1 hold selected (indicated by a red arrow and label 1).

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	Selected Date Time	Selected By User
Administrative	ADMIN	Administrative	Active	Agency			5/22/2025 11:06:38 AM	Migration

On the View Box screen, scroll down (1) to the **Legal Holds** section to see the hold placed on the item. To remove the hold, click once (2) on **Create & Update** dropdown menu, click once (3) on **Update**.

Supplemental Information: Hold

Remove hold for one item: Edit field(s)

Update Box 0001222151 - 4

Legal Holds: Select All Remove All Legal Holds selected: 1

Page 1 | Jump to Page: Go

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	Selected Date Time	Selected By User
Administrative			Active				5/22/2025 11:06:38 AM	Migration

Legal Holds

Hold Code Hold Name Hold Status Hold Type Authorized By Individual Released By Individual

Search Clear (Rollover for Current Search) Switch

Page 1 | Jump to Page: Go The search found 0 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
-----------	-----------	-------------	-----------	--------------------------	------------------------

Disposition Approval:

Disposition Approval	Selected Date Time	Selected By User
☐ Approved		

Hold Retention: ☒ (3)

Hold Retention Comments: (2)

Scroll down the Update page to the **Legal Holds** section. Click once (1) on the **Remove** button for the selected hold type. Next, if information appears in the **Hold Retention Comments** field (2), delete the information. Gimmal will automatically deselect (3) the **Hold Retention** checkbox when this page is updated.

Remove hold for one item: Click Update

Update Box 0001222151 - 4

Legal Holds: Select All Remove All Legal Holds selected: 0

Page 1 | Jump to Page: Go

Quick Description	Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual	Selected Date Time	Selected By User
-------------------	-----------	-----------	-------------	-----------	--------------------------	------------------------	--------------------	------------------

Legal Holds

Hold Code Hold Name Hold Status Hold Type Authorized By Individual Released By Individual

Search Clear (Rollover for Current Search) Switch

Page 1 | Jump to Page: Go The search found 0 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
-----------	-----------	-------------	-----------	--------------------------	------------------------

Disposition Approval:

Disposition Approval	Selected Date Time	Selected By User
☐ Approved		

Hold Retention: ☒

Hold Retention Comments:

Update

Once the hold is removed and information from the **Hold Retention Comments** field is deleted, click once on the **Update** button to complete the process.

Remove hold for multiple items: Update some or update all

The screenshot shows the Gimmal Records Center User interface. The 'Execute Bulk Updates on Boxes' dialog is open. The 'Bulk Update' button is highlighted. The 'Update Some' radio button is selected, and the 'Update the 3 Boxes I selected on the previous page' option is chosen. The 'Bulk Update' button is highlighted with a red arrow.

Box Barcode	Organization Quick Description	AIN	Record Series Title	Box Size	Agency Box Number	Eligible Destruction Date	Accessioned
0001224171	Johnny Agency	Texas Big State Agency - 988 - East - -	Transmittals - Original	AC	3	AC=Latest page date	A RC 3
0001224171	Location Masked	Texas Big State Agency - 988 - - -	Transmittals - Original	AC	3	AC=Latest page date	A RC 7
0001221983	Location Masked	Texas Big State Agency - 988 - - -	Transmittals - Original	AC	3	AC=Latest page date	A RC 6
0001221982	Location Masked	Texas Big State Agency - 988 - - -	Transmittals - Original	AC	3	AC=Latest page date	A RC 5
0001221981	Location Masked	Texas Big State Agency - 988 - - -	Transmittals - Original	AC	3	AC=Latest page date	A RC 4
0001221980	Location Masked	Texas Big State Agency - 988 - - -	Transmittals - Original	AC	3	AC=Latest page date	A RC 3

Update Some: If hold is to be removed on some items, click once on checkboxes on the left side of the grid (1). If items are on multiple pages (2) turn to *Supplemental Information: Preferences: Number of items on home page* (Page 175) to update the home page so all items appear on a single page. After selecting items, click once (3) on **Create & Update**, then click once (4) on **Bulk Update**.

Update All: If hold is to be removed on all items, do not select any checkboxes on the left side of the grid. Click once (3) on **Create & Update**, then click once (4) on **Bulk Update**.

Remove hold for multiple items: How many are selected?

The screenshot shows the Gimmal Records Center User interface. The 'Execute Bulk Updates on Boxes' dialog is open. The 'Bulk Update' button is highlighted. The 'Update All' radio button is selected, and the 'Update the 20 Boxes matching my current query criteria' option is chosen. The 'Bulk Update' button is highlighted with a red arrow.

UPDATE SOME: Since some checkboxes were selected on the home page grid, the first radio button is selected for the total number of boxes selected in the search results.

The screenshot shows the Gimmal Records Center User interface. The 'Execute Bulk Updates on Boxes' dialog is open. The 'Bulk Update' button is highlighted. The 'Update All' radio button is selected, and the 'Update the 20 Boxes matching my current query criteria' option is chosen. The 'Bulk Update' button is highlighted with a red arrow.

UPDATE ALL: Since no checkboxes were selected on the home page grid, the second radio button is selected for the total number of boxes in the search results.

Remove hold for multiple items: Edit information

Execute Bulk Updates on Boxes

Legal Holds:

Action: **Apply** (1) Legal Holds selected: 0

Page 1: **Remove** (2)

Quick Description Hold Code Hold Name Hold Status Hold Type Authorized By Individual Released By Individual Selected Date Time Selected By User

Legal Holds

Hold Code Hold Name Hold Status Hold Type Authorized By Individual Released By Individual

Search Clear (Rollover for Current Search) Switch

Page 1 | Jump to Page: Go The search found 7 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
☐ ADMIN	Administrative	Active	Agency		
☐ AUDIT	Audit	Active	Agency		
☐ FISCAL	Fiscal	Active	Agency		
☐ LEGAL	Legal	Active	Agency		
☐ LEGAL - P.I.	Legal - Public Information	Active	Agency		
☐ PEND A.R.	Pending Archival Review	Active	Agency		
☐ PEND A.T.	Pending Archival Transfer	Active	Agency		

Cancel Bulk Update

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Click once (1) on **Action:** dropdown menu and select **Remove**. In the **Hold Status** field (2), type **AGENCY** and click **Search** to show all of the different hold types. Click each of the seven radio buttons to remove any hold type for the items that were selected.

Remove hold for multiple items: Remove Hold Retention Comments

Hold Retention Comments:

☐ Clear Field Hold Retention Comments

Hold Retention Comments is a place for the client to explain why something is on hold. Since the hold is being removed, the comment needs to be removed (this data field is empty like all other data fields on a Bulk Update screen, it does not mean the field is empty for any of the boxes being updated). Click once on the checkbox for **Clear Field Hold Retention Comments**.

Remove hold for multiple items: Click Bulk Update

Execute Bulk Updates on Boxes

Legal Holds:

Hold Code Hold Name Hold Status Hold Type Authorized By Individual Released By Individual

Search Clear (Rollover for Current Search) Switch

Page 1 | Jump to Page: Go The search found 0 Legal Holds

Hold Code	Hold Name	Hold Status	Hold Type	Authorized By Individual	Released By Individual
☐ ADMIN	Administrative	Active	Agency		
☐ AUDIT	Audit	Active	Agency		
☐ FISCAL	Fiscal	Active	Agency		
☐ LEGAL	Legal	Active	Agency		
☐ LEGAL - P.I.	Legal - Public Information	Active	Agency		
☐ PEND A.R.	Pending Archival Review	Active	Agency		
☐ PEND A.T.	Pending Archival Transfer	Active	Agency		

Cancel Bulk Update

Licensed to Texas State Library and Archives Commission, Logged in as Johnny Agency - Records Center User (RCU)-DR request

When the information is correct, click once on the **Bulk Update** button to complete the process. An email will be received when the system completes the updates.

Supplemental Information: Hold

NOTES

[illegible]

Supplemental Information: Hold

NOTES

[illegible]

Supplemental Information: Update / Bulk Update

Sometimes, information in Gimmal will need to be updated for items that are at the SRC, have been delivered to the agency, or have not yet been sent to the SRC. The type of update selected will depend upon if this is an update for a single item (**Update: A single item**, below) or for several items (**Bulk Update: Several items**, Page 213).

A note about updates

An employee at the SRC prints a new item label due to updates for the following Item Type fields:

- **Boxes:**
 - ◇ Agency Box Number
 - ◇ Beginning File
 - ◇ Ending File
- **Microforms:**
 - ◇ Record Series (Agency Item Number - Record Series Title)
 - ◇ Earliest File Date
 - ◇ Latest File Date
 - ◇ Agency Reel Number
 - ◇ Beginning File
 - ◇ Ending File
- **Files:**
 - ◇ Agency File Name
- **Disaster Recovery:**
 - ◇ Agency Container Number

If any of these fields are updated, a new label is required. To get the new label printed:

For items at the SRC: Contact the SRC Circulation Desk (see **Contact List**, page 16).

For items that have been delivered from the SRC: When requesting pick up, use the **Comments** field to explain that a new container label needs to be printed due to field updates.

Update: A single item

1. Select the tab.
2. Enter search terms into the **Quick Search**.
3. Click once on the **Search** button.
- OR
4. Click once on **Search**.
5. Click once on **Search Fields** then complete data fields on the Search screen.

Supplemental Information: Update / Bulk Update

Search results

Box Barcode: 0000992059

Organization Quick Description: [Empty]

AIN: [Empty]

Record Series Title: [Empty]

Box Size: [Empty]

Agency Box Number: [Empty]

Eligible Destruction Date: >1/1/2027

Accessioned: [Empty]

Deleted: [Empty]

Create: [Empty]

Created By Description: [Empty]

Last Modified Date: [Empty]

Last Modified By Description: [Empty]

Hold Retention: [Empty]

Legacy Tracking Number: [Empty]

Search [Clear] (Rollover for Client Search) [Switch]

Request [Create & Update] [View] [Search] [Export] [The Cart]

Page 1 | Jump to: [Empty]

Create [Bulk Create] [Bulk Update] [Bulk Replace]

The search found 1 Box

Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	Agency
Texas Big State Agency - 988 - East - -	33	Individual Accident Reports	FE	45				R	RP-48	100

Either search method will result in information populating in the tab's home page grid. Click once (1) on the checkbox for the item, then click once (2) on the dropdown for **Create & Update**, and click once (3) on **Update**.

Update Box screen

Update Box 0000992059 - 100

Cancel [Update & View] **Update**

Fields marked with an * are required.

Box Quick Description: 0000992059 - 100

*Organization: Texas Big State Agency - 988 - East - -

Agency Name: [Empty] Division Name: [Empty] Business Unit Name: [Empty] Business Sub-Unit Name: [Empty] Organization Quick Description: [Empty]

Search Here: [Empty]

Current Search: There is no current Organization query. To search Organization, enter your criteria and click the Search button.

*Records Series: 33 - Individual Accident Reports

Organization Quick Description: [Empty] AIN: [Empty] RSIN: [Empty] Record Series Title: [Empty] Event Code: [Empty] Years: [Empty]

Search Here: [Empty]

Months: [Empty] Days: [Empty] AC Definition: [Empty] Remarks: [Empty]

Current Search: There is no current Records Series query. To search Records Series, enter your criteria and click the Search button.

*Box Size: RP-48

*Earliest File Date: 09/01/2014

*Latest File Date: 08/31/2015

*Drive Date: 08/31/2015

*Agency Box Number: 100

*Beginning File: Poster A1

Update the appropriate field(s) then click once on the **Update** button at the top right.

BOXYBIT *If Organization is updated, the Record Series will need to be selected.*

Bulk Update*: Several items

The screenshot shows the Gimmal Bulk Update interface. At the top, there's a navigation bar with 'Gimmal' logo and various menu items like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. Below this is a sub-navigation bar with tabs: Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The main form area contains several input fields for search criteria: Box Barcode, Organization Quick Description, AIN, Record Series Title, Box Size, Agency Box Number, Eligible Destruction Date, Accessioned, Deleted, Create Date, Created By Description, Last Modified Date, Last Modified By Description, Hold Retention, and Legacy Tracking Number. There are 'Search' and 'Clear' buttons, and a 'Switch' button. Below the form is a 'Request' dropdown and a 'Create & Update' dropdown. A 'Search Fields' dropdown menu is open, showing options like Keyword, Duplicate, and Query. A red arrow points to the 'Search Fields' dropdown menu.

1. Click once on the item type tab.
2. Enter search terms into the **Quick Search**.
3. Click once on the **Search** button.
- OR
4. Click once on **Search**.
5. Click once on **Search Fields** then complete data fields on the Search screen.

The screenshot shows the Gimmal Bulk Update interface with search results. The 'Search' button is highlighted. The search results table shows 4 boxes found. The table has columns: Organization Quick Description, AIN, Record Series Title, Event Code, Years, Months, Days, AC Definition, Archival, Box Size, and Agency. The first two rows are selected with checkboxes.

Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	Agency
Texas Big State Agency - 988 - East - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	2
Texas Big State Agency - 988 - East - -	06	Employee Earnings Records	AC	10			AC=Latest end of employment date	R	RC	1
Texas Big State Agency - 988 - - -	10	Internal Fiscal Management Reports	AC	10			AC=Latest report date		RC	1
Texas Big State Agency - 988 - - -	27	File Reports and Updates	AC	20	6		AC=Latest file date		RC	1

Either method will result in information populating in the tab's home page grid.

UPDATE SOME: If **some** items are to be updated, click once on checkboxes on the left side of the grid (1). If items appear on multiple pages (2) turn to **Supplemental Information: Preferences: Number of items on home page** (Page 175) to update the home page grid so all items appear on a single page. After items are selected, click once (3) on **Create & Update**, then click once (4) on **Bulk Update**.

UPDATE ALL: If **all** items are to be updated, do not select any checkboxes on the left side of the grid. Click once (3) on **Create & Update**, then click once (4) on **Bulk Update**.

When Bulk Updating the record series for a set of items, the Organization has to be selected on the Bulk Update screen. So, for this reason, when selecting the items, make sure they are all assigned to the same Organization. A solution to do this is to sort the column for Organization Quick Description.

*Bulk update is not an option for Disaster Recovery or Fiche Circulation items.

Bulk Update on Boxes screen

Execute Bulk Updates on Boxes

Please keep in mind the following:

- Although Bulk Updates are recorded in history, they cannot easily be undone.
- Bulk updates to entire queries should not be performed when other users may be creating or editing data records.
- Bulk Updates have the potential to consume significant resources. As a result, it is recommended large Bulk Updates be performed during off hours.
- You may be prevented from bulk updating some data records due to security or due to deletion.

Please select the range of data records you would like to update:

☒ Update the 2 Boxes I selected on the previous page

☐ Update the 4 Boxes matching my current query criteria

Because Bulk Updates may take several minutes to execute, please enter your email address to be notified when the Bulk Update is complete.

Email:

Organization:

Search Here:

Current Search:

Records Series:

Search Here:

Current Search:

Box Size:

Earliest File Date:

Date Offset: Years

Latest File Date:

At the top left of the screen (1) the upper radio button is selected if any checkboxes were selected on the previous screen when some items on the home page grid are to be updated. The lower radio button is selected if no checkboxes were clicked on the previous screen and all items on the home page grid are to be updated.

The data fields will be empty since information for multiple boxes cannot appear at the same time. Be aware that data entered in any field will replace the previous information when updated.

Date Offset: Years

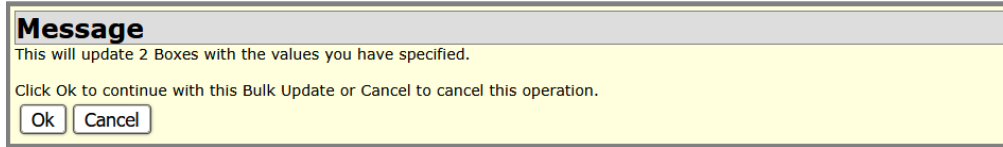
Date Offset is used to bulk update the Beginning File Date, Ending File Date, or Drive Date fields for the boxes by a specific number of years (or months or days).

For example, the Drive Date for three boxes all have the Drive Date of Dec. 31 for three separate years. Completing this field with 2 will adjust the Drive Date to two years later for each item.

When the data fields are complete, click once (2) on **Bulk Update** at the top right.

Supplemental Information: Update / Bulk Update

Bulk Update Message information



This dialogue box explains how many items are to be updated. Click once on **Ok**.

If there are only a few items to update, the update may take effect instantly. If there are several items to update, it might take a while for the update to complete. Either way, when a bulk update is complete, the person who performed the bulk update will get an email that explains how many items were updated.

Supplemental Information: Update / Bulk Update

NOTES

[illegible]

Supplemental Information: Delete or Permanent Withdrawal

A definition lesson: **Accessioned** means an item has been received into the SRC. Accessioned items cannot be deleted in Gimmal, but they can still be removed. Read on...

Find items to be deleted

For Boxes and Microforms, use **Quick Search** area (1) or click once (2) on **Search** then click once on **Search Fields** to complete any of the data fields to find items.

BOXYBIT For Files, Disaster Recovery, or Fiche Circulation items, please turn to Page 218.

Check to confirm each box or microform item has never been to the SRC

Hover the mouse cursor over (do not click) the item's barcode (1) for a popup window (2) to show. Look (3) to **Accessioned**. If it (4) is **False** and (5) the **Hold Retention** field (6) is **False**, the item can be deleted. Continue to Page 218.

If **Accessioned** is **True** (7), the item has been accessioned into the SRC and cannot be deleted, regardless of the status of the Hold Retention field. It can be requested for Permanent Withdrawal.

Permanent Withdrawal:

Accessioned items at the SRC with (8) the **Hold Retention** field (9) marked **False**: Select item(s), then select **Delivery from SRC** on the **Request** dropdown, then see **Supplemental Information: Alternate Fulfillment Method** (Page 177).

Accessioned items at the agency with (8) the **Hold Retention** field (9) marked **False**, email the SRC manager (see **SRC Contact list**, Page 16) to request permanent withdrawal.

Request delete or permanent withdrawal

Email: Unaccessioned items to delete

File Message Insert Options Format Text Review Help Acrobat

Send From johnny.agency@texasbigstateagency.texas.gov To gimmal@tsl.texas.gov Cc Bcc Subject Please Delete Box

Hello.
Please delete the below box barcode in Gimmal.
0000872371

Thank you.
--Johnny

Johnny Agency
Texas Big State Agency
512-555-5167

Email: Accessioned items for Permanent Withdrawal

File Message Insert Options Format Text Review Help Acrobat

Send From johnny.agency@texasbigstateagency.texas.gov To zbruton@tsl.texas.gov Cc Bcc Subject Requesting Permanent Withdrawal

Hello.
This box was delivered to the agency. Please process this box as permanent withdrawal.
0000978034

Thank you.
--Johnny

Johnny Agency
Texas Big State Agency
512-555-5167

Email: Unaccessioned items to delete - Boxes and microforms never accessioned and files, disaster recovery boxes, and fiche circulation items (files, disaster recovery, and fiche circulation items do not have Accessioned classifications) not at the SRC and assigned to an employee at the agency in the Current Location column can be deleted in Gimmal by sending an email to **gimmal@tsl.texas.gov**

- The SRC Gimmal administrator will reply to the request when the items are deleted.

Email: Accessioned items for Permanent Withdrawal - Accessioned boxes or microform items at the SRC or delivered to the agency from the SRC (delivered items must be assigned to an employee at the agency in the current location column) can be permanently withdrawn by sending an email to the SRC manager **zbruton@tsl.texas.gov**

- The SRC manager will respond to the request for permanent withdrawal.

BOXYBIT *Whether the items are going to be deleted or permanently withdrawn, please list the barcodes (make sure to include all leading zeros) within the body of the email. At the top of the email, include a description (boxes, files, disaster recovery, or microforms) of the item type. **Do not attach or paste a screengrab of the barcodes.***

When items are deleted in Gimmal, the records management team at the agency is copied on all correspondence.

How to see unaccessioned items that might need to be deleted in Gimmal

The screenshot shows the Gimmal Quick Search interface. At the top, there is a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, and Print. Below this is a tabbed interface with tabs for Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series. The main search area contains several input fields: Box Barcode, Organization Quick Description, AIN, Record Series Title, Box Size, Agency Box #, Eligible Destruction Date, and Accessioned. The Accessioned field is currently set to FALSE. Below these are fields for Deleted, Create Date, Created By Description, Last Modified Date, Last Modified By Description, Hold Retention, and Legacy Tracking #. The Hold Retention field is also set to FALSE. At the bottom left, there is a Search button, a Clear button, and a Rollover for Current Search button. A red arrow labeled '1' points to the Accessioned field, a red arrow labeled '2' points to the Hold Retention field, and a red arrow labeled '3' points to the Search button.

- On the **Boxes** or **Microforms** tab:
 - Type **false** in the **Quick Search** field for **Accessioned**. This will look for items not received into the SRC. Be aware that items created within the last few days will also generate in this search; they have been created and might have been requested but not yet picked up and/or received into the SRC. To use a filter not to include items created during the last week, use the less than symbol < followed by a date from a week ago in the **Create Date** field. Example: <07/01/2025
BOXYBIT When viewing a box or a microform item in Gimmal, *Accessioned* is seen as a checkbox. When an item is initially received into the SRC, the checkbox is automatically selected and the checkbox will show as ☒ selected in Gimmal when viewing an individual item. Boxes and microforms that have been accessioned cannot be deleted in Gimmal, they can be requested for Permanent Withdrawal.
 - Type **false** in the **Quick Search** field for **Hold Retention**. This will look for items not placed on hold.
BOXYBIT When an item is on hold in Gimmal, the *Hold Retention* checkbox is automatically selected and the checkbox will show as ☒ selected in Gimmal when viewing a box or microform item.
 - Click once (3) on **Search**.
- On the **Files**, **Disaster Recovery**, or **Fiche Circulation** tab, the item must be assigned to an agency employee in the **Current** Location column to be eligible for deletion.

To request items to be deleted, please refer to **Email: Unaccessioned items to delete** (Page 218).

When items are deleted in Gimmal, the records management team at the agency is copied on all correspondence.

BOXYBIT Why is it important to have items deleted from Gimmal?
 Gimmal items created in error (or items created but never sent to the SRC) should be removed from Gimmal to avoid confusion with legitimate items that have been sent to or delivered from the SRC. It is just good housekeeping to have only relevant items in Gimmal.

Supplemental Information: Delete or Permanent Withdrawal

NOTES

[illegible]

Supplemental Information: Export

The process illustrated in this section to export items from Gimmal to a worksheet begins with a search that is exported and opened in Excel (a worksheet application).

Search for items to export

1. Click once on the item type tab.
Then
2. Type search terms into any **Quick Search** fields to find items or click once (3) on **Search** to find all items at the agency and at the SRC.
3. Click once on **Search**. If results populate in the grid, continue to **Search results, Export items** (Page 222).
OR
4. To search data fields, click once on **Search** dropdown menu.
5. Click once on **Search Fields** and continue below.

Search for Boxes screen

Enter search information into any fields (including the **Gimmal System Fields** on the bottom half of the screen) to find the item(s) to export information. This example search (1) is for all boxes for AIN 02. Click once (2) on **Execute**.

Supplemental Information: Export

Search results, Export items

The screenshot shows the Gimmel Records Center interface. At the top, there's a navigation bar with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. Below this is a search bar with various filters and a search button. The search results are displayed in a table with columns: Box Barcode, Current Location, Organization Quick Description, AIN, Record Series Title, Event Code, Years, Months, Days, AC Definition, Archival, Box Size, and A. The table contains several rows of data, including items with 'Location Masked' and items assigned to specific users like 'Roman O. Manager' and 'Jane Division'. Red arrows and numbers 1-5 highlight key features: 1. Search button, 2. Current Location field, 3. Selection checkbox, 4. Search button, 5. Export button.

Box Barcode	Current Location	Organization Quick Description	AIN	Record Series Title	Event Code	Years	Months	Days	AC Definition	Archival	Box Size	A
0000774345	Location Masked	Texas Big State Agency - 988 - North - -	17	Requests for Printing/Distribution	N/A	2					RC	1
0000774346	Roman O. Manager	Texas Big State Agency - 988 - Central - -	02	Client Questionnaire	N/A	8					RC	2
0000774348	Jane Division	Texas Big State Agency - 988 - West - -	03	Data Entry Form	US	2	6				RC	4
0000774349	Location Masked	Texas Big State Agency - 988 - East - -	03	Data Entry Form	US	2	6				RC	8
0000774350	Johnny Agency	Texas Big State Agency - 988 - East - -	03	Data Entry Form	US	2	6				RP-36	6
0000774351	Location Masked	Texas Big State Agency - 988 - East - -	03	Data Entry Form	US	2	6				RC	11
0000774352	Location Masked	Texas Big State Agency - 988 - East - -	03	Data Entry Form	US	2	6				RC	7

The **Current Location** (1) shows which items are currently at the agency or at the SRC. When **Location Masked** shows in the Current Location (2), that indicates the item is at the SRC. If a coworker's name is in the Current Location field, the item is at the agency. To export information, click the checkbox (3) for specific items on this screen page (4). To export all items, do not select any checkboxes. Selecting items on additional pages deselects items on other pages. If items appear on multiple pages and only some of those items are being selected, turn to **Supplemental Information: Preferences: Number of items on home page** (Page 175) to reformat the results (up to 500 items) so they appear on a single page.

Once it has been determined what is to be exported, click once (5) on **Export**.

This export example is for all items.

Parts of the Export Home Page screen

The screenshot shows the 'Export Home Page Grid Boxes' window. It includes a navigation bar at the top with links like Home, Preferences, Reports, Requests, Admin, Dashboard, Help, Print, and Logout. The main area is titled 'Export Home Page Grid Boxes' and contains several sections: 'Records to Export' with radio buttons for 'Export Selected (0)' and 'Export Search Results (204)'; 'Select table' with a dropdown menu; 'Configure Export' with fields for 'Enter Field Delimiter', 'Text Qualifier', 'File Prefix', 'Extension', and a checkbox for 'Remove carriage returns'; 'Available Fields' and 'Fields to Export' columns with a 'Select All' button; 'Existing Profiles' dropdown, 'Export Name' text field, and 'Scope' dropdown; 'Save Query', 'Delete Query', and 'Clear' buttons; and an 'Export History' section with a 'Refresh' button and a table of recent exports. Numbered callouts 1 through 14 point to specific elements: 1 points to the 'Export Selected' radio button, 2 to the 'Export Search Results' radio button, 3 to the 'Select table' dropdown, 4 to the 'Configure Export' section, 5 to the 'Available Fields' list, 6 to the 'Select All' button, 7 to the 'Fields to Export' list, 8 to the up arrow button, 9 to the down arrow button, 10 to the 'Existing Profiles' dropdown, 11 to the 'Export Name' field, 12 to the 'Scope' dropdown, 13 to the 'Save Query' button, and 14 to the 'Export History' table.

1. **Export Selected:** When ☐ Export Selected (0) is selected (shown here as an unselected gray circle), the number of checkboxes selected on the Home Page Grid appears here and will export information for only those items.
 2. **Export Query:** When ☐ Export Search Results (204) is selected (shown here as an automatically selected white circle since no items were selected on the home page), fields from all items on all pages generated on the home page will export information.
 3. **Select Table:** This is the tab the export is extracting information. It is automatically selected.
 4. **Configure Export:** The Pipe symbol needs to appear in **Enter Field Delimiter**. Use **SHIFT ** to create the Pipe symbol | .
Text Qualifier can be left empty as well as File Prefix.
 Make sure **Extension** field has **.csv** selected.
 Click the checkbox for **Remove carriage returns**. Not selecting this can misformat the data.
 5. **Available Fields:** These are the data fields for the Item Type tab where the export is being done. Double click on a field label and the field is moved to the **Fields to Export** column on the right. Whereas, double click on the field name in the Fields to Export column and to remove the field name from the Fields to Export column. Click once on the **Select All** button (6) at the bottom of the list to select all field names.
 7. **Fields to Export:** The fields selected from the Available Box Fields column. The order the fields appear in this column, top to bottom, is the order these fields will appear left to right on the worksheet. To change the order, click once on the field name and click once on the button (8) to move the field name up or click once on the button (9) to move the field name down. Click once on the **Clear** button at the bottom to erase all selections.
 10. **Existing Profiles:** Click once on the dropdown menu for Existing Profiles to use a saved export profile. The fields will autopopulate in the Fields to Export column. To save an unsaved export profile (not seen in the above illustration): For **Export Name**, name the export profile (11). For **Scope** (12), select **User**. Then click once (13) on **Save Query** to save data.
 14. **Available Exports:** Recent exports are archived here.
- BOXYBIT** To see a definition for each export field name, turn to *Export Glossary (Page 231)*.

Supplemental Information: Export

Export

The screenshot shows the 'Export Home Page Grid Boxes' window in the Gimmal application. The window has a title bar with 'Close' and 'Export' buttons. The 'Export' button is highlighted with a red arrow. The main area contains sections for 'Records to Export', 'Configure Export', 'Available Fields', and 'Fields to Export'. The 'Configure Export' section includes fields for 'Field Delimiter', 'Text Qualifier', 'File Prefix', 'Extension', and a checkbox for 'Remove carriage returns'. The 'Available Fields' and 'Fields to Export' sections are separated by a double-headed arrow. The 'Export History' section at the bottom shows a table of available exports.

Click **Export** at the top right. Make sure pop-ups are allowed, contact the agency IT team for help.

Export File popup

The screenshot shows the 'Export Home Page Grid Boxes' window with a popup message. The popup message says: 'Export file Box202_0000774385_Export_2025-07-11T18-13-40.csv is being created. Please check back in a few moments to view your file.' A red arrow points to the 'Refresh' button in the 'Export History' section.

A popup like this will show near the top of the screen. If this popup does not show, go to Page 225.

Wait a few minutes then click once on the **Refresh** button near the bottom of the screen.

The screenshot shows the 'Export History' section of the 'Export Home Page Grid Boxes' window. The 'Export History' section has a 'Refresh' button. Below it is a table of available exports. The table has two columns: 'Create Date' and 'File Name'. The latest export file is highlighted with a red arrow.

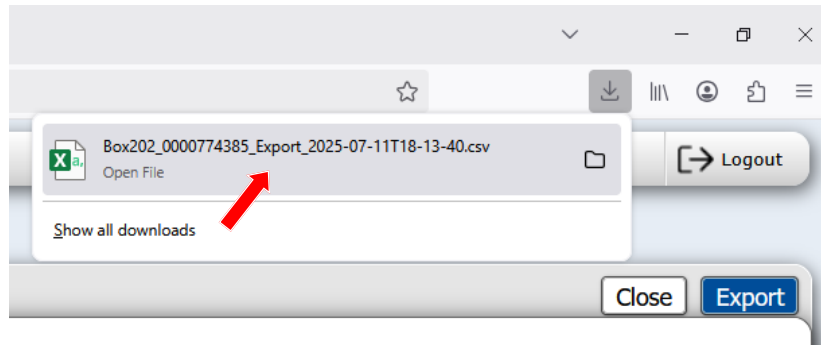
Please be patient, it may take a few minutes for the file to show. When the file is available, it is listed first. Click once on the latest export file and go to Page 225.

Supplemental Information: Export

Export Excel File

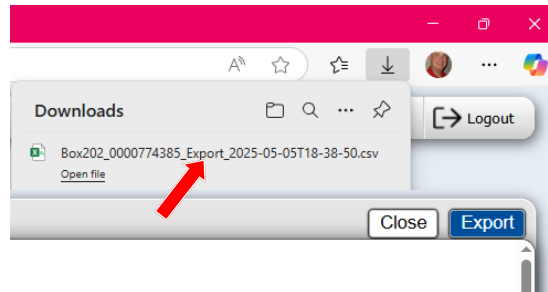
Depending on if **Firefox** or **Microsoft Edge** is used, the download popup might display differently. If pop-ups are blocked on the computer, contact the agency IT department for assistance.

For **Firefox**:



Click once on the file information to open the Excel worksheet.

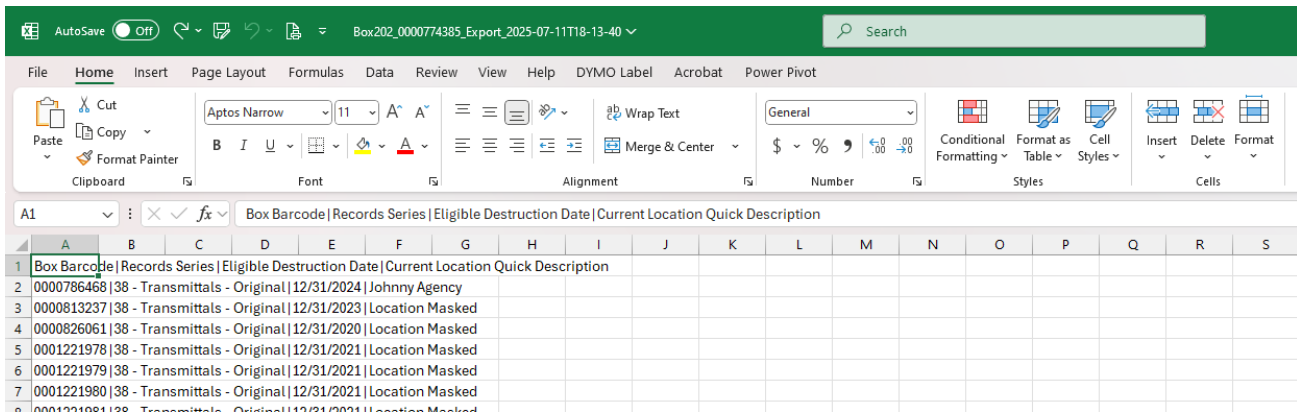
For **Microsoft Edge**:



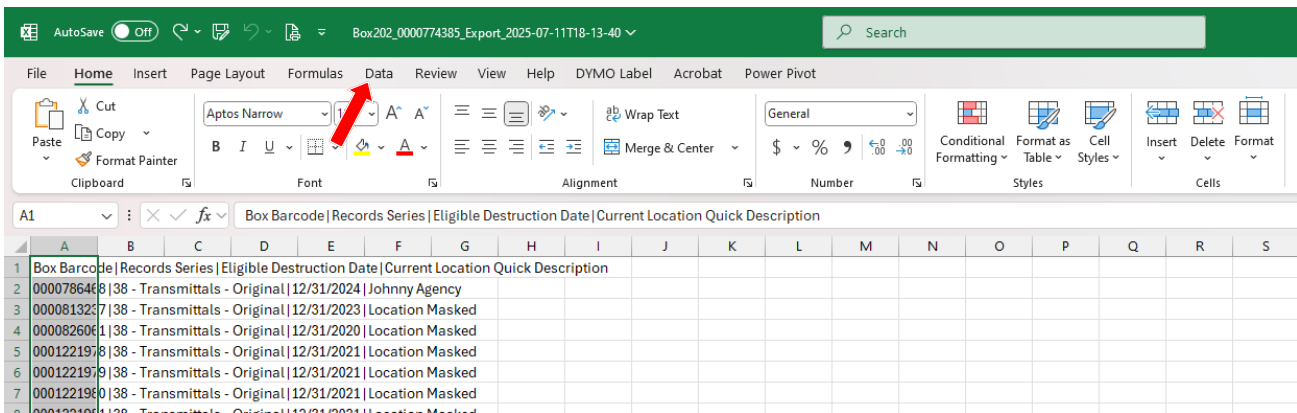
Click once on the file information to open the Excel worksheet.

Supplemental Information: Export

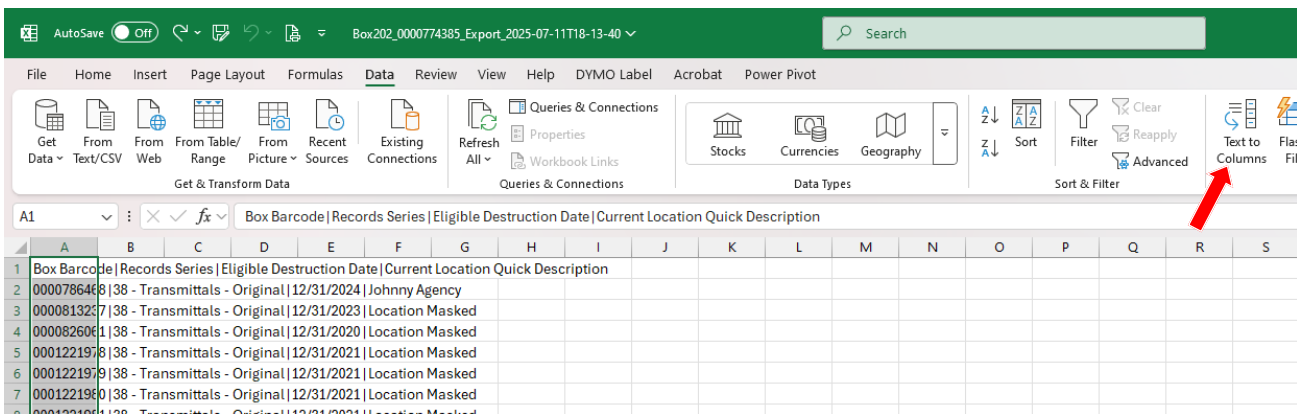
Convert Text to Columns on the Excel Worksheet



With the first cell on the worksheet selected, select the entire column by holding **SHIFT** and pressing **A**.



With the text in the first column selected, click once on the **Data** tab at the top of the screen.



When **Data** was clicked, a new set of menu options appears. Click once on **Text to Columns** in the Data Tools menu.

BOXYBIT *The Text to Columns icon might look differently depending on the version of Excel.*

Supplemental Information: Export

Convert Text to Columns Wizard: Step One

Convert Text to Columns Wizard - Step 1 of 3

The Text Wizard has determined that your data is Fixed Width.
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

☒ Delimited - Characters such as commas or tabs separate each field.

☐ Fixed width - Fields are aligned in columns with spaces between each field.

Preview of selected data:

1	Box Barcode	Records Series	Eligible Destruction Date	Current Location
2	0000786468138	- Transmittals - Original	12/31/2024	Johnny Agency
3	0000813237138	- Transmittals - Original	12/31/2023	Location Maske
4	0000826061138	- Transmittals - Original	12/31/2020	Location Maske
5	0001221978138	- Transmittals - Original	12/31/2021	Location Maske

Cancel < Back Next > Finish

The first step: Click once (1) on the radio button for **Delimited** then click once (2) on **Next**.

Convert Text to Columns Wizard: Step Two

Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☒ Tab

☐ Semicolon

☐ Comma

☐ Space

☐ Other:

Treat consecutive delimiters as one

Text qualifier:

Data preview

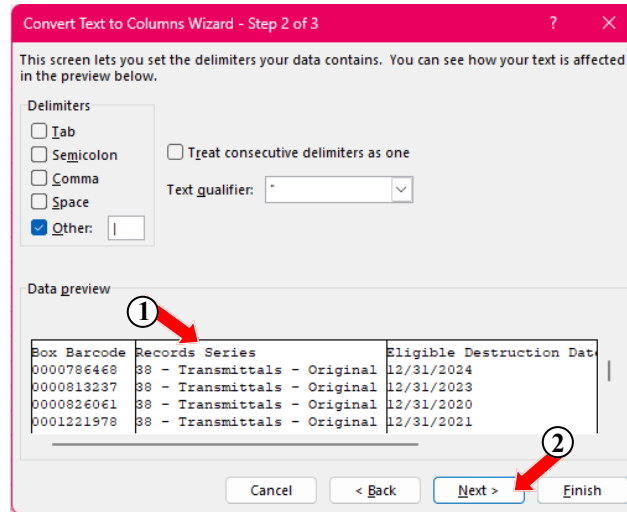
Box Barcode	Records Series	Eligible Destruction Date	Current Location
0000786468138	- Transmittals - Original	12/31/2024	Johnny Agency
0000813237138	- Transmittals - Original	12/31/2023	Location Maske
0000826061138	- Transmittals - Original	12/31/2020	Location Maske
0001221978138	- Transmittals - Original	12/31/2021	Location Maske

Cancel < Back Next > Finish

The area to modify in this step is **Delimiters**. Click once on the checkbox (1) for **Other:**. If anything else is selected (Tab, in this case (2)), deselect it. Click once (3) in the data field next to **Other:** and type the Pipe symbol. Use **SHIFT ** to create the Pipe symbol |

Supplemental Information: Export

Convert Text to Columns Wizard: Step Two (continued)



Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☐ Tab

☐ Semicolon

☐ Comma

☐ Space

☒ Other: |

☐ Treat consecutive delimiters as one

Text qualifier: *

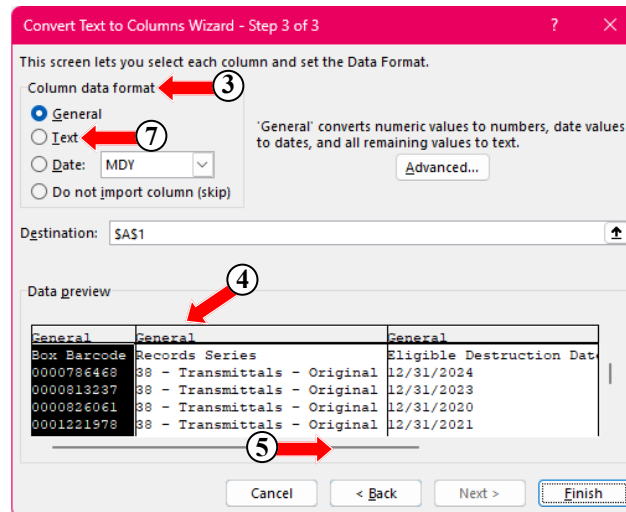
Data preview

Box Barcode	Records Series	Eligible Destruction Date
0000786468	38 - Transmittals - Original	12/31/2024
0000813237	38 - Transmittals - Original	12/31/2023
0000826061	38 - Transmittals - Original	12/31/2020
0001221978	38 - Transmittals - Original	12/31/2021

Cancel < Back Next > Finish

When the checkbox is selected for Other and the Pipe symbol is in the Other: field, the **Data Preview** section (1) converts the information to columns. Once the screen looks similar to the above illustration, click once (2) on **Next**.

Convert Text to Columns Wizard: Step Three



Convert Text to Columns Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format

☒ General

☐ Text

☐ Date: MDY

☐ Do not import column (skip)

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

Advanced...

Destination: \$A\$1

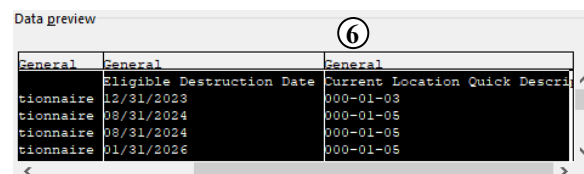
Data preview

General	General	General
Box Barcode	Records Series	Eligible Destruction Date
0000786468	38 - Transmittals - Original	12/31/2024
0000813237	38 - Transmittals - Original	12/31/2023
0000826061	38 - Transmittals - Original	12/31/2020
0001221978	38 - Transmittals - Original	12/31/2021

Cancel < Back Next > Finish

What is selected (3) in the **Column data format** section affects the information for each column (4) in **Data Preview**. The first column is already selected (the black box with white text is an indication that area is selected).

The first thing to do is select all of the columns in the **Data preview** section. With the first column selected, use the scroll bar (5) to move to the final column. At the final column, hold the SHIFT key and click once in the last column. All columns will be selected (see 6, below). Move the scroll bar back to the left to make sure all columns are selected.



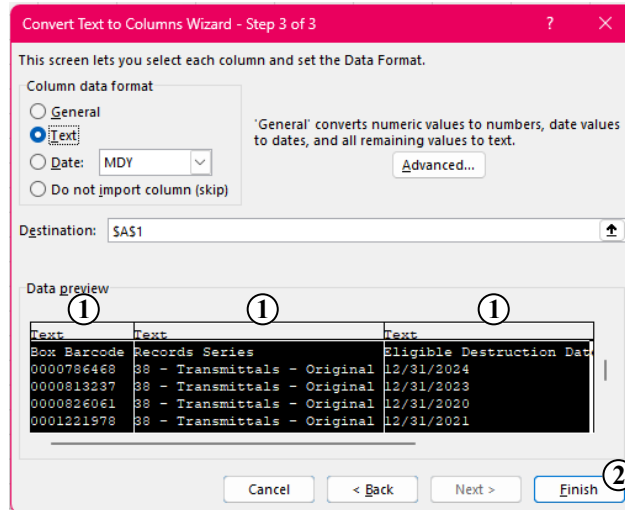
Data preview

General	General	General
Eligible Destruction Date	Current Location Quick Descri	
tionnaire 12/31/2023	000-01-03	
tionnaire 08/31/2024	000-01-05	
tionnaire 08/31/2024	000-01-05	
tionnaire 01/31/2026	000-01-05	

Return to **Column data format** (in previous illustration), click once (7) on the radio button for **Text**.

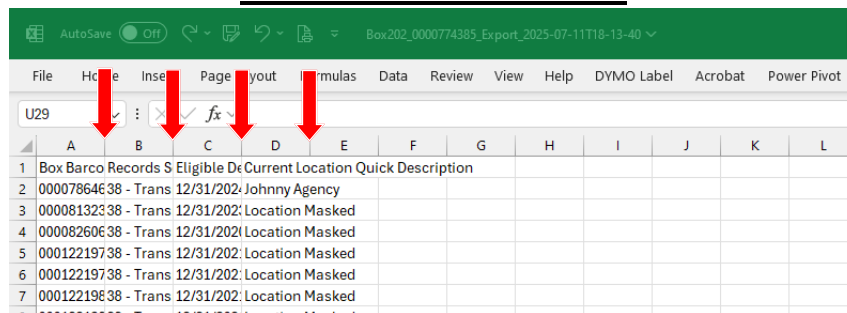
Supplemental Information: Export

Convert Text to Columns Wizard: Step Three (continued)



The information header for each column changes from General to Text (1). Once this is done, click once (2) on **Finish** to return to the Excel worksheet.

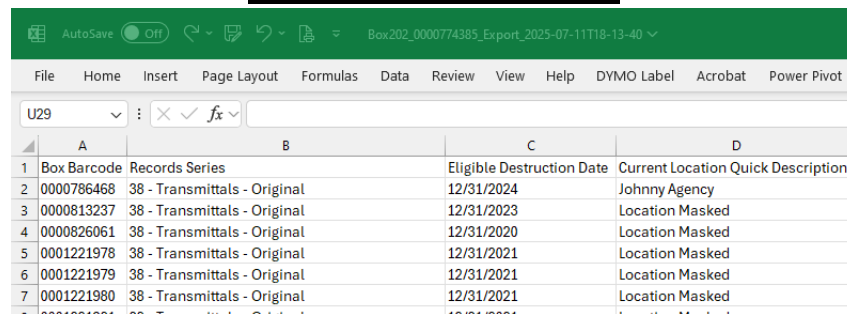
Return to the worksheet



The data are now split into columns. The fields chosen in Gimmal export are now the column headers. Use the column guides at the top of each row (the vertical lines illustrated with the arrows between the column letters) to move each column so all of the data for each column can be seen.

BOXYBIT If a triangle  is seen in the top left corner of a cell, it is not anything to be concerned for this process. It is considered an error checking feature of Excel.

The finished worksheet



Once the worksheet is complete, be sure to save it to the computer or an external storage device for future reference.

Supplemental Information: Export

NOTES

[illegible]

Export Glossary

These terms are export fields or export labels on the Export Home Page Grid screen in Gimmal. Where this information appears is named at the end of each term in italics.

AC Definition: This field provides the meaning for AC in the Event Code field to determine Drive Date. *Appears on the Boxes, Microforms, Imaging Production, and Record Series tabs.*

Accessioned: Item in Gimmal that has been processed into the SRC and billing is active. If the item has been delivered to the agency, a space is being reserved for the item in the SRC and regular billing continues for the item. *Appears on the Boxes, and Microforms tab.*

Addition: On the Microforms tab, this field explains what was added to an existing microform item. This field is completed by an employee at the SRC to detail the additional images added to an existing microform item after an imaging production work order is finished. On the Imaging Production tab, this is a Yes/No dropdown menu for the client to tell the work order is for an addition to an existing microform item. *Appears on the Imaging Production tab.*

Address: The physical location at an agency for a Gimmal client. *Appears on the Individuals tab.*

Agency Box Number: The identification number for an RC, RP-36, or RP-48 box. The agency employee or agency protocol determines the agency box number. *Appears on the Boxes tab.*

Agency Container Number: The box number for a disaster recovery box. The agency employee or agency protocol determines the agency container number. *Appears on the Disaster Recovery tab.*

Agency Contract Number: This is an optional field used when an agency wants to assign their own contract number when submitting a contract for storage and/or imaging services at the SRC. Completed by a Texas State Library employee. *Appears on the Organizations tab.*

Agency File Name: The primary name on a file tab that is data entered into Gimmal by an employee at the owning agency. *Appears on the Files tab.*

Agency Head Address: The work address for the leader of a government entity. *Appears on the Organizations tab.*

Agency Head Email Address: The email address for the leader of a government entity. *Appears on the Organizations tab.*

Agency Head First Name: The forename of the leader of a government entity. *Appears on the Organizations tab.*

Agency Head Last Name: The surname of the leader of a government entity. *Appears on the Organizations tab.*

Agency Head Title: The job title of the leader of a government entity. *Appears on the Organizations tab.*

Agency Name: The name of a government entity. *Appears on the Organizations, Boxes, Files, Disaster Recovery, Microforms, Imaging Production, and Records Series tabs.*

Agency Reel Number: The container number assigned to a reel of microfilm or a bundle of microfiche. *Appears on the Microforms tab.*

Agency Reel Number Range / Box Number Range / Item Barcode(s): The container number range for items sent to the Texas State Library imaging department for an imaging production work order. *Appears on the Imaging Production tab.*

Agency Sub File Name: The secondary name on a file tab that is data entered into Gimmal by an employee at the owning agency. *Appears on the Files tab.*

AIN: Agency Item Number is the unique, required number assigned to a Record Series Title on a State of Texas Records Retention Schedule. The AIN cannot be the same as a Record Series Item Number. Once an AIN is designated to a record series, it cannot be reused for a different series at any point in the future. *Appears on the Boxes, Microforms, Imaging Production, and Records Series tabs.*

Supplemental Information: Export Glossary

Archival: If nothing appears in this column (derived from the agency's Records Retention Schedule), items for the record series are not considered archival and can proceed through the destruction process without approval from the State Archives. *Appears on the Boxes, Microforms, Imaging Production, and Records Series tabs. For the Boxes, Microforms, and Imaging Production tabs, it is in the Records Series table.*

Codes that can appear in this field are:

A/I – Used with records series that will be transferred to the State Archives or University Archives and do not require a prior review.

R/O – Used with records series that have undetermined archival value and require a review by the State Archivist or University Archivist prior to being transferred to the State Archives or University Archives.

E – Used with records series that have been determined to have no archival value and are exempt from archival review. (Must have prior approval to use this code).

Archive Date: The date an item first arrived and was accessioned into the SRC. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

Available Exports: When a new export is ready to be viewed, it will appear in this list. To get the export to show, click the Refresh button. It could take a few minutes for the export to show. This Available Exports list is user-specific and no one else can see this list. Export will appear in the list until the user clicks the **Delete** link on the left side of the export. *Appears on Export Home Page Grid screen.*

Backup Analyst: The backup analyst is the Texas State Library Government Information Analyst who fills in for the analyst assigned to an agency when the primary analyst is not available. *Appears on the Organizations tab.*

Beginning File: The first item in a container. *Appears on the Boxes, Microforms, and Imaging Production tabs.*

Bill To: Address: This is the physical address where any printed invoice is sent to an agency to charge for State and Local Records Management Division billable services of the Texas State Library. *Appears on the Organizations tab.*

Bill To: First Name: The forename of the person responsible for receiving invoices sent to an agency for State and Local Records Management Division billable services of the Texas State Library. *Appears on the Organizations tab.*

Bill To: Last Name: The surname of the person responsible for receiving invoices sent to an agency for State and Local Records Management Division billable services of the Texas State Library. *Appears on the Organizations tab.*

Billable Imaging Production: A checkbox field selected when an agency is to be billed for imaging production work orders. *Appears on the Organizations tab.*

Billable Storage: A checkbox field selected when an agency is to be billed for storage at the SRC. *Appears on the Organizations tab.*

Billable Training: A checkbox field selected when an agency is to be billed for training hosted by the State and Local Records Management Division of the Texas State Library. *Appears on the Organizations tab.*

Billing Phone Number: The phone number for the person who receives invoices for billable services received from the State and Local Records Management Division of the Texas State Library. *Appears on the Organizations tab.*

Box Barcode: The unique identification number assigned to each box that is in Gimmal. New boxes in Gimmal receive this number at the end of the creation process. *Appears on the Boxes tab.*

Box Quick Description: A combination of the Box Barcode and Agency Box # fields in the Gimmal System Fields section of the View Box screen. *Appears on the Boxes tab.*

Box Size: The box sizes for regular storage in the SRC are: RC (12-1/4"L x 10-1/4"W x 15-3/4"D), RP-36 (6"L x 6"W x 36"D), and RP-48 (6"L x 6"W x 48"D). *Appears on the Boxes tab.*

Supplemental Information: Export Glossary

Box Type: The box sizes for storage in the Disaster Recovery Vault at the SRC are: RC, RC2, RC3, RC4, RC5, RC10. RC is the standard-size (12-1/4"L x 10-1/4"W x 15-3/4"D) storage box. *Appears on the Disaster Recovery tab.*

Business Sub-Unit Name: The third divisional category for an organization. The business sub-unit is a part of a business unit. The business unit is part of a division. A division is part of an organization. May appear as Sub Business Unit in some view screens. *Appears on the Boxes tab.*

Business Unit Name: The second divisional category for an organization. The business unit is part of a division. A division is part of an organization. *Appears on the Organizations, Boxes, Files, Disaster Recovery, Microforms, Imaging Production, and Records Series tabs.*

Clear: Click this button to clear the Fields to Export column. *Appears on Export Home Page Grid screen.*

Confidentiality: This is determined by an agency employee for a Record Series. *Appears on the Records Series tab.*

Contact Name: The person who will be contacted if there is a question about an imaging production work order. *Appears on the Imaging Production tab.*

Contact Phone Number (and extension): The phone number for the contact person listed on an imaging production work order. *Appears on the Imaging Production tab.*

County: The county name for a local government. *Appears on the Organizations tab.*

Create Date: The date an item was created in Gimmal. *Appears on the Organizations, Individuals, Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series tabs.*

Created By Barcode: The unique identification number for the individual who created a specific item in Gimmal. *Appears on the Organizations, Individuals, Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series tabs.*

Created By Description: The name of the individual who created a specific item in Gimmal. *Appears on the Organizations, Individuals, Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series tabs.*

Created Item(s) will be stored at the SRC?: This is a checkbox in Gimmal that displays as True or False on an exported worksheet. True means the output item of an imaging production work order is stored at the SRC. False means the output item was returned to the client. *Appears on the Imaging Production tab.*

Current Location Barcode: The unique identification number assigned to each location that is in Gimmal. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

Current Location Item Type ID: Item Type ID is a value used in the database to differentiate between the different types of Items (File, Box, User, Location, Series, etc.) and is a field that can generally be ignored. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

Current Location Quick Description: Where an item is currently assigned either at the SRC or to an employee at the state agency. The information that appears in the Current Location column in Gimmal is what will appear for this field on the export worksheet. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

Days: The third numerical field for records retention. *Appears on the Boxes, Microforms, Imaging Production, and Records Series tabs.*

Delete Query: Click this button to delete this saved export profile. Once this is done, it cannot be reversed. *Appears on Export Home Page Grid screen.*

Deleted: This field will always be False since agency employees see only non-deleted information. *Appears on the Organizations, Individuals, Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series tabs.*

Supplemental Information: Export Glossary

Delinquent: Used by the Texas State Library to signify when an organization is late on payments for training, storage, and/or imaging work. *Appears on the Organizations tab.*

Description: Explains the Record Series Title. *Appears on the Records Series tab.*

Disaster Recovery Barcode: The unique identification number assigned to a disaster recovery box. Gimmal generates the number when the box is created. *Appears on the Disaster Recovery tab.*

Disaster Recovery Quick Description: Found in the Gimmal System Fields section, this is a combination of the disaster recovery barcode and the organization for the item. *Appears on the Disaster Recovery tab.*

Division Name: The agency's name for a specific division. *Appears on the Organizations, Boxes, Files, Disaster Recovery, Microforms, Imaging Production, and Records Series tabs.*

Document Preparation: This field details any additional manual work (removing staples, paper clips, or adhesive; ironing wrinkled pages; unbinding documents; etc.) that the Texas State Library's imaging department will need to do prior to filming documents for an imaging work order. *Appears on the Imaging Production tab.*

Drive Date: The date when added with the retention period fields (years, months, and days) allows Gimmal to calculate an eligible destruction date. *Appears on the Boxes and Microforms tabs.*

Duplicate: Yes or No optional dropdown field where the agency tells the Texas State Library's imaging department if a duplicate is to be created for an item on an imaging production work order. Displays as True for Yes, False for No when exported. *Appears on the Microforms and Imaging Production tabs.*

Earliest File Date: The earliest date for documents/images in a single container. *Appears on the Boxes, Microforms, and Imaging Production tabs.*

Eligible Destruction Date: The earliest date an item can process through destruction. Destruction must be requested by the RMO/RML in email. *Appears on the Boxes and Microforms tabs.*

Email: The work email address for a Gimmal account. *Appears on the Individuals tab.*

Email Invoice Address: This is the email address where an electronically-generated invoice is sent to an agency to charge for billable services completed by the State and Local Records Management Division of the Texas State Library. *Appears on the Organizations tab.*

Ending File: The last item in a container. *Appears on the Boxes, Microforms, and Imaging Production tabs.*

Enter Field Delimiter: What will separate the column on the worksheet after export. The Pipe Symbol needs to be in this field. Pipe Symbol is generated by holding down **SHIFT** and pressing only the backslash key \ . *Appears on Export Home Page Grid screen.*

Event Code: Determining the Drive Date begins with this field. Event Code is a series of acronyms used as part of the retention period fields for a Record Series Title. The acronyms are: AC, after close; AV, administratively valuable; CE, calendar year end; FE, fiscal year end; FF, federal fiscal year end; LA, life of asset; PM, permanent; US, until superseded. N/A in the Event Code field means there is no acronym for this Record Series. This replaces the Retention Code field with no data on the Retention Schedule. *Appears on the Boxes, Microforms, Imaging Production, and Record Series tabs.*

Existing Profiles: Previously saved Export profiles with predetermined fields. *Appears on Export Home Page Grid screen.*

Export History: This is where previous exports are archived in the Available Exports table. Exports run by other users cannot be seen here. *Appears on Export Home Page Grid screen.*

Export Name: To save the list of fields on this export, enter a unique name for this export. *Appears on Export Home Page Grid screen.*

Export Search results: Radio button on Export Home Page Grid screen. When selected, all items on the home page will export. *Appears on Export Home Page Grid screen.*

Export Selected: Radio button on Export Home Page Grid screen. When selected only items selected on the home page will export. *Appears on Export Home Page Grid screen.*

Supplemental Information: Export Glossary

Extension: Make sure **.csv** is selected to successfully convert the file to an Excel document.
Appears on Export Home Page Grid screen.

Fiche Circulation Barcode: The unique identification number assigned when some microfiche jackets are requested as part of, not all of, a bundle. *Appears on the Fiche Circulation tab.*

Fiche Circulation Quick Description: Fiche circulation barcode followed by information from the Fiche Title(s) to Pull (separated by //) field detailing items requested. *Appears on the Fiche Circulation tab.*

Fiche Count: The amount of microfiche jackets in a microfiche bundle. This number is recommended to be less than 200. *Appears on the Microforms tab.*

Fiche Title(s) to Pull (separated by //): The fiche title pages requested to be delivered using Fiche Circulation. *Appears on the Fiche Circulation tab.*

File Barcode: The unique identification number assigned to each file that is in Gimmel. Gimmel generates this number when the file is created. *Appears on the Files tab.*

File Notes: This optional data field contains information about a file created in Gimmel. *Appears on the Files tab.*

File Prefix: Text the user assigns to the beginning of file being exported, followed by the system-generated file name. *Appears on Export Home Page Grid screen.*

File Quick Description: Agency file name followed by the file barcode. *Appears on the Files tab.*

Film Size: The size of a physical or electronic microform item. *Appears on the Microforms tab.*

Film Type: The type of a physical or electronic microform item. *Appears on the Microforms and Fiche Circulation tabs.*

First Name: The forename for a client's Gimmel account. *Appears on the Individuals tab.*

Hold Retention: Displays as True on a worksheet (checkbox selected in Gimmel) for those items placed on hold, displays as False on a worksheet (checkbox not selected in Gimmel) for those items not placed on hold. This field automatically updates when a client selects the hold type. *Appears on the Boxes, and Microforms tab.*

Hold Retention Comments: An optional data field the client can use to explain why an item is on hold. *Appears on the Boxes and Microforms tabs.*

Home Location Barcode: The unique identification number assigned to each location that is in Gimmel. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tab.*

Home Location Item Type ID: Item Type ID is a value used in the database to differentiate between the different types of Items (File, Box, User, Location, Series, etc.) and is a field that can generally be ignored. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tab.*

Home Location Quick Description: SRC is the Home Location for Boxes and Microforms (unless microform items were created and delivered to the agency). DRCHECKIN is the Home Location for Disaster Recovery items. For a file, the box it is assigned to is the home location for a file. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

Hub Location Barcode: The unique identification number assigned to each location that is in Gimmel. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

Hub Location Item Type ID: Item Type ID is a value used in the database to differentiate between the different types of Items (File, Box, User, Location, Series, etc.) and is a field that can generally be ignored. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

Supplemental Information: Export Glossary

Hub Location Quick Description: This is used primarily for billing purposes. When an item is transferred into a Hub Location and it does not already have that place as its Hub Location (like a new item in Gimmal), Gimmal then automatically sets the Hub Location for that item. When an item is transferred into a Hub Location and it already has that place as its Hub Location (like returning an item to the SRC), then Gimmal knows it is not a new item (not an accession). *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

If Source Item is stored at the SRC, how many will TSL imaging use?: When items are in storage at the SRC and they are being used as part of an imaging production work order at the Texas State Library's imaging department, this tells how many items are being sent from SRC storage to the imaging department. *Appears on the Imaging Production tab.*

Image Count: When the Texas State Library's imaging department creates a microform item, this field will show how many images were filmed for that item. *Appears on the Microforms tab.*

Imaging Production Barcode: The unique number Gimmal assigns to an imaging production work order. When it appears for an item on the Microforms tab, that means the item originated as part of an imaging production work order. *Appears on the Microforms and Imaging Production tabs.*

Imaging Production Process Only: Appears as a checkbox in Gimmal. On a worksheet True means the reel of microfilm was only processed as a result of an imaging production work order by a Texas State Library imaging department employee; False means the reel of microfilm was not "only processed", though it could have been processed as part of an imaging production work order by a Texas State Library imaging department employee. *Appears on the Microforms and Imaging Production tabs.*

Imaging Production Quick Description: The information is composed of imaging production barcode and organizational information. *Appears in the Microforms and Imaging Production tabs.*

Individual Quick Description: Combination of the first name and last name fields. *Appears on the Individuals tab.*

Individuals Barcode: The unique identification number for a client's Gimmal account. Gimmal generates this number when the Gimmal account is created. *Appears on the Individuals tab.*

Is At Archive Location: This is a standard field built into the software. The Texas State Library does not use this field. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

Is At Home: When the checkbox is selected (True on the worksheet), the item is at its Home location. When the checkbox is not selected (False on the worksheet), the item not at its Home location. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

Is Missing: This is a standard field built into the software. This field is not used by the Texas State Library. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

Item Approval Date: The date the Record Series was approved. *Appears on the Records Series tab.*

Job Title: A Gimmal client's job title at their agency. *Appears on the Individuals tab.*

Label Print Date: The date the SRC employee printed a label for an item stored at the SRC. Labels are printed only for items circulated through the SRC. The SRC does not use information from this field. *Appears on the Individuals tab.*

Supplemental Information: Export Glossary

Label Printed: Yes means a label has been printed for the item. No means a label has not been printed for the item. Though this appears on all tabs, labels are printed only for items circulated through the SRC. *Appears on the Organizations, Individuals, Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series tabs.*

Label Printed Date: The date when the label was printed for the item stored at the SRC. Though this appears on most tabs, labels are printed only for items circulated through the SRC. *Appears on the Organizations, Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series tabs.*

Last Login Date: The last time a Gimmal client logged in to their account. *Appears on the Individuals tab.*

Last Modified By Barcode: The barcode for the Gimmal client who last modified the item in the system. *Appears on the Organizations, Individuals, Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series tabs.*

Last Modified By Description: The name of the Gimmal client who last modified the item in the system. *Appears on the Organizations, Individuals, Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series tabs.*

Last Modified Date: The date when the item was last modified in the system. *Appears on the Organizations, Individuals, Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series tabs.*

Last Name: The surname for a client's Gimmal account. *Appears on the Individuals tab.*

Last Transferred By Barcode: The barcode for the Gimmal client who created an item that has not been sent to the SRC or the SRC employee's barcode who transferred the item to or from the SRC. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

Last Transferred By Description: The name of the Gimmal client who created an item that has not been sent to the SRC or the SRC employee's name who transferred the item to or from the SRC. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

Last Transferred Date: The date created for an item that has not been sent to the SRC or the date the item was transferred to or from the SRC. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, and Imaging Production tabs.*

Latest File Date: The latest date for documents/images in a single container. *Appears on the Boxes, Microforms, and Imaging Production tabs.*

Legacy Notes: Information that appeared in the Notes field for any storage database/software prior to May 2015. *Appears on the Boxes, and Microforms tabs.*

Legacy Tracking Number: Tracking number was used as an indexing tool in storage databases/software prior to May 2015. The numbers with the hyphen are found at the bottom right on the Transmittal of State Records (RMD 101). That document stopped being produced in May 2015. *Appears on the Boxes and Microforms tabs.*

Legal Citations: Legal information concerning the Record Series is in this field. *Appears on the Boxes, Microforms, Imaging Production, and Records Series tabs.*

Microform Barcode: The unique identification number assigned to each microform that is in Gimmal. Gimmal generates this number when the item is created. *Appears on the Microforms tab.*

Microform Quick Description: A combination of the Microform Barcode and Agency Reel # fields in the Gimmal System Fields section of the View Microform screen. *Appears on the Microforms tab.*

Months: The second numerical field for records retention. *Appears on the Boxes, Microforms, Imaging Production, and Records Series tabs.*

Notes: Optional information field for additional data for an item. *Appears on the Organizations, Individuals, Boxes, Disaster Recovery, Microforms, and Records Series tabs.*

Supplemental Information: Export Glossary

Notes or Brief Project Description: Data field on the Imaging Production Tab where the client provides additional information about the imaging work order. *Appears on the Imaging Production tab.*

Number of Duplicates: The amount of duplicates requested when submitting an imaging production work order. *Appears on the Imaging Production tab.*

Number of Fiche Pulled: The SRC employee who pulls the requested microfiche jackets for delivery will complete this field to detail how many microfiche jackets were requested for delivery using Fiche Circulation. *Appears on the Fiche Circulation tab.*

Number of Items being Sent: Quantity of containers sent from the agency or from SRC storage to the SRC imaging department for an imaging production work order. *Appears on the Imaging Production tab.*

Number of Pulls: The SRC employee who pulls the requested microfiche jackets for delivery will complete this field to detail the number of locations for the request. *Appears on the Fiche Circulation tab.*

Organization: Composed of the agency name, division name, business unit name, and business sub-unit name. *Appears on the Fiche Circulation tab.*

Organization History: An additional notes field with important agency information. *Appears on the Organizations tab.*

Organization Nickname: This is an optional data field concerning the agency. *Appears on the Organizations tab.*

Organization Quick Description: Composed of the agency name, division name, business unit name, and business sub-unit name. *Appears on the Organizations, Boxes, Files, Disaster Recovery, Microforms, Imaging Production, and Records Series tabs.*

Organization Status: The options here are Administered, Agency, Component, Inactive, and Local. *Appears on the Organizations tab.*

Organizations: The Organization assignment(s) to a Gimmal client. *Appears on the Individuals tab.*

Password Creation Date: This is when the password was created or updated. *Appears on the Individuals tab.*

Phone Number: The work phone number for a Gimmal client. *Appears on the Individuals tab.*

Printed By User Barcode: The barcode for the SRC employee who printed the label for an item. *Appears on the Organizations, Individuals, Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series tabs.*

Printed By User Description: The name of the SRC employee who printed the label for an item. *Appears on the Organizations, Individuals, Boxes, Files, Disaster Recovery, Microforms, Fiche Circulation, Imaging Production, and Records Series tabs.*

Recertification Required: This field is maintained by the Texas State Library Government Information Analyst to easily identify the agencies which must have a retention schedule and recertify the schedule. This field is selected for the agency-level organization and is not selected at an organization's division, business unit, and business sub-unit level. On an export worksheet, True means the checkbox is selected, false means the checkbox is not selected. *Appears on the Organizations tab.*

Record Series Title: The title for a record series. This originates from the agency's Records Retention Schedule. *Appears on the Boxes, Microforms, Imaging Production, and Records Series tabs.*

Records Series: Combination field composed of agency item number and record series title. *Appears on the Boxes, Microforms, and Imaging Production tabs.*

Records Series Quick Description: Composed of the agency item number and record series title. *Appears on the Records Series tab.*

Supplemental Information: Export Glossary

Refresh: Click this button to reload the Available Exports table to show a recently completed export. This might have to be clicked several time before the export shows up. *Appears on Export Home Page Grid screen.*

Remarks: Provides more information about the record series. *Appears on the Records Series tab.*

Remove Carriage Returns: Make sure this checkbox is selected. Otherwise, the Excel worksheet might misformat. *Appears on Export Home Page Grid screen.*

Retention Action: This is a standard field built into the software. The Texas State Library does not use this field. *Appears on the Disaster Recovery and Fiche Circulation tabs.*

RM Contact Address: The work address for the person the Records Management Officer appoints to assume RMO duties on their behalf. Or the RM Contact can work in conjunction with the Records Management Officer when it comes to RMO duties. The RM Contact is a point of contact for recertifications and other records management responsibilities when the RMO appoints someone else for those duties. The RM Contact status can only be appointed by the RMO. *Appears on the Organizations tab.*

RM Contact Email Address: The email address for the person the Records Management Officer appoints to assume RMO duties on their behalf. Or the RM Contact can work in conjunction with the Records Management Officer when it comes to RMO duties. The RM Contact is a point of contact for recertifications and other records management responsibilities when the RMO appoints someone else for those duties. The RM Contact status can only be appointed by the RMO. *Appears on the Organizations tab.*

RM Contact First Name: The forename for the person the Records Management Officer appoints to assume RMO duties on their behalf. Or the RM Contact can work in conjunction with the Records Management Officer when it comes to RMO duties. The RM Contact is a point of contact for recertifications and other records management responsibilities when the RMO appoints someone else for those duties. The RM Contact status can only be appointed by the RMO. *Appears on the Organizations tab.*

RM Contact Last Name: The surname for the person the Records Management Officer appoints to assume RMO duties on their behalf. Or the RM Contact can work in conjunction with the Records Management Officer when it comes to RMO duties. The RM Contact is a point of contact for recertifications and other records management responsibilities when the RMO appoints someone else for those duties. The RM Contact status can only be appointed by the RMO. *Appears on the Organizations tab.*

RM Contact Phone Number: The work phone number for the person the Records Management Officer appoints to assume RMO duties on their behalf. Or the RM Contact can work in conjunction with the Records Management Officer when it comes to RMO duties. The RM Contact is a point of contact for recertifications and other records management responsibilities when the RMO appoints someone else for those duties. The RM Contact status can only be appointed by the RMO. *Appears on the Organizations tab.*

RM Contact Title: The job title for the person the Records Management Officer appoints to assume RMO duties on their behalf. Or the RM Contact can work in conjunction with the Records Management Officer when it comes to RMO duties. The RM Contact is a point of contact for recertifications and other records management responsibilities when the RMO appoints someone else for those duties. The RM Contact status can only be appointed by the RMO. *Appears on the Organizations tab.*

RMO Address: The work address for the agency's Records Management Officer. *Appears on the Organizations tab.*

RMO Email Address: The email address for the agency's Records Management Officer. *Appears on the Organizations tab.*

RMO First Name: The forename for the agency's Records Management Officer. *Appears on the Organizations tab.*

RMO Last Name: The surname for the agency's Records Management Officer. *Appears on the Organizations tab.*

Supplemental Information: Export Glossary

RMO Phone Number: The work phone number for the agency's Records Management Officer. *Appears on the Organizations tab.*

RMO Title: The job title for the agency's Records Management Officer. *Appears on the Organizations tab.*

Role: The role controls the permissions for each Gimmal client. The agency Records Management Officer (or Records Management Liaison) determines the role the agency's Gimmal clients will be assigned. A detailed description of each role can be found on the Gimmal User Information form found in the Help link at the top of the screen. *Appears on the Individuals tab.*

RSIN: The record series item number is derived from the Texas State Records Retention Schedule (RRS) for certain Record Series Titles that appear on the agency's Records Retention Schedule. Records series item numbers are assigned by the State and Local Records Management Division of the Texas State Library and Archives Commission. Unlike the Agency Item Number (AIN), this is not a required field for every Record Series Title and it may appear multiple times in Gimmal and on the agency's Records Retention Schedule. *Appears on the Boxes, Microforms, Imaging Production, and Records Series tabs.*

Save Query: Click this button to save the export profile after completing the above data fields. *Appears on Export Home Page Grid screen.*

Schedule Approval Date: The approval date for the full records retention schedule. This date is for the records retention schedule's first approval or the most recent recertification, whichever is later. *Appears on the Records Series tab.*

Scope: The export profile can be saved for the User (no one else can see it), System (anyone can see it), or Role (only users assigned to the same role can see it). *Appears on Export Home Page Grid screen.*

Select Table: Identifies the tab items are going to export. *Appears on Export Home Page Grid screen.*

Secondary Billing Address: This is the alternate or secondary physical address where any printed invoice is sent to an agency for billable services of the Texas State Library's State and Local Records Management Division. *Appears on the Organizations tab.*

Secondary Billing Email Address: The alternate or secondary email address responsible for receiving invoices sent to an agency for billable services of the Texas State Library's State and Local Records Management Division. *Appears on the Organizations tab.*

Secondary Billing First Name: The forename of the alternate or secondary person responsible for receiving invoices sent to an agency for billable services of the Texas State Library's State and Local Records Management Division. *Appears on the Organizations tab.*

Secondary Billing Last Name: The surname of the alternate or secondary person responsible for receiving invoices sent to an agency for billable services of the Texas State Library's State and Local Records Management Division. *Appears on the Organizations tab.*

Secondary Billing Phone Number: The phone number for the person responsible for receiving invoices sent to an agency for billable services of the Texas State Library's State and Local Records Management Division. *Appears on the Organizations tab.*

Security Exclude: This is a control feature assigned to certain system administrators to see information across all areas of Gimmal. *Appears on the Individuals tab.*

Select All: Click this button to select all fields for the export. *Appears on Export Home Page Grid screen.*

Supplemental Information: Export Glossary

Series Status: Appears in Gimmal as: Approved, Obsolete, or Provisional. The Texas State Library Government Information Analyst assigns the approval status for the Record Series when a State of Texas Records Retention Schedule is approved, amended, or recertified. *Appears on the Records Series tab.*

Approved means the record series appears on the retention schedule is eligible for storage at the SRC and all Gimmal users at the agency can see items assigned to their agency organizations for the record series in Gimmal.

Obsolete means the record series does not appear on the retention schedule and is ineligible for storage at the SRC and only those assigned to the Gimmal Role of RMO or RML can see items assigned to the record series in Gimmal.

Provisional means the record series is eligible for storage at the SRC, but it is not on the currently-approved retention schedule. Gimmal items might be assigned to it that need to be moved to a different record series or it exists in anticipation of a new series being added via the amendment/retention schedule recertification process.

Source Item(s) in storage at SRC: When the item used as the basis for an imaging production work order is at the SRC, the checkbox is selected (on the worksheet, it appears as True). When the item used as the basis for an imaging production work order is not at the SRC, the checkbox is not selected (on the worksheet, it appears as False). *Appears on the Imaging Production tab.*

Source Item(s) will be stored at the SRC: This is a checkbox in Gimmal that displays as True or False on an exported worksheet. True means the source item sent to the Texas State Library's imaging department for an imaging production work order will be stored at the SRC after imaging is complete. False means the source item will not be stored at the SRC after imaging is complete.

Appears on the Imaging Production tab.

Storage: Checkbox to identify SRC storage. True on the worksheet means the checkbox in Gimmal is selected and there is storage for the Record Series in the SRC. False on the worksheet means the checkbox in Gimmal is not selected and there is no storage for the Record Series in the SRC.

Appears on the Records Series tab.

Sub Business Unit Name: See Business Sub-Unit Name. Misformatted in the detailed search fields. *Appears on the Boxes, Files, Disaster Recovery, Microforms, Imaging Production, and Records Series tabs.*

Text Qualifier: A character used to help avoid issues when the Delimiter character exists in the data being exported (i.e. commas in a csv file). Generally, " is assigned, as that is what Excel expects. *Appears on Export Home Page Grid screen.*

TSLAC Analyst: The Texas State Library and Archives Commission Government Information Analyst assigned to a specific state agency. *Appears on the Organizations and Records Series tabs.*

TSLAC Contract Number: This number is assigned to contracts received for storage and/or imaging services at the SRC. It is formatted # - ## - ### or # - ## / ## - ###. The first digit is always 6 (a code for the Texas State Library). The middle set of numbers is the fiscal year for the contract. The final set of numbers is for the contracted agency. *Appears on the Organizations tab.*

Type of Duplicate: The size of the duplicate of a microform item. *Appears on the Imaging Production tab.*

Type of Government: Identification of a state and/or local government or some other business entity. *Appears on the Organizations tab.*

User Name: The login name for anyone who accesses Gimmal. *Appears on the Individuals tab.*

Vital: Not many record series use this field. A mention of Vital in the Remarks field is normally sufficient since Vital does not appear on the SLR 105 (Records Retention Schedule) form. On the export worksheet, True means the checkbox is selected, False means the checkbox is not selected. *Appears on the Imaging Production and Records Series tabs.*

Supplemental Information: Export Glossary

What is being sent to TSL imaging to be imaged?: The medium sent to the Texas State Library's imaging department as part of an imaging production work order. *Appears on the Microforms and Imaging Production tabs.*

What product size is TSL imaging creating?: The medium's size for the output created from an imaging production work order. *Appears on the Imaging Production tab.*

What product type is TSL imaging creating?: The medium created by the Texas State Library's imaging department as the result of an imaging production work order. *Appears on the Microforms and Imaging Production tabs.*

Years: The first numerical field for records retention. *Appears on the Boxes, Microforms, Imaging Production, and Records Series tabs.*

Export Fields and the Tabs Where They Appear

	ORG*	INDIV*	B	F	DR	MF	FC	IP	REC SER
AC Definition									
Accessioned									
Addition									
Address									
Agency Box Number									
Agency Container Number									
Agency Contract Number									
Agency File Name									
Agency Head Address									
Agency Head Email Address									
Agency Head First Name									
Agency Head Last Name									
Agency Head Title									
Agency Name									
Agency Reel Number									
Agency Reel Number Range / Box Number Range / Item Barcode(s)									
Agency Sub File Name									
AIN									
Archival									
Archive Date									
Backup Analyst									
Beginning File									
Bill To Address									
Bill To First Name									
Bill To Last Name									
Billable Imaging Production									
Billable Storage									
Billable Training									
Billing Phone Number									
Box Barcode									
Box Quick Description									
Box Size									
Box Type									
Business Sub-Unit Name									

ORG=Organizations; INDIV=Individuals; B=Boxes; F=Files; DR=Distaster Recovery; MF=Microforms; FC=Fiche Circulation; IP=Imaging

Production; REC SER=Records Series

*Tabs/Fields seen only by customers assigned to the RMO or RML role in Gimmal

Export Fields and the Tabs Where They Appear

	ORG*	INDIV*	B	F	DR	MF	FC	IP	REC SER
Business Unit Name									
Confidentiality									
Contact Name									
Contact Phone Number (and extension)									
County									
Create Date									
Created By Barcode									
Created By Description									
Created Item(s) will be stored at the SRC									
Current Location Barcode									
Current Location Item Type ID									
Current Location Quick Description									
Days									
Deleted									
Delinquent									
Description									
Disaster Recovery Barcode									
Disaster Recovery Quick Description									
Division Name									
Document Preparation									
Drive Date									
Duplicate									
Earliest File Date									
Eligible Destruction Date									
Email									
Email Invoice Address									
Ending File									
Event Code									
Fiche Circulation Barcode									
Fiche Circulation Quick Description									
Fiche Count									
Fiche Title(s) to Pull (separated by //)									
File Barcode									
File Notes									

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Production; REC SER=Records Series *Tabs/Fields seen only by customers assigned to the RMO or RML role in Gimmal

Export Fields and the Tabs Where They Appear

	ORG*	INDIV*	B	F	DR	MF	FC	IP	REC SER
File Quick Description									
Film Size									
Film Type									
First Name									
Hold Retention									
Hold Retention Comments									
Home Location Barcode									
Home Location Item Type ID									
Home Location Quick Description									
Hub Location Barcode									
Hub Location Item Type ID									
Hub Location Quick Description									
If Source Item is stored at the SRC, how many will TSL imaging use?									
Image Count									
Imaging Production Barcode									
Imaging Production Process Only									
Imaging Production Quick Description									
Individual Quick Description									
Individuals Barcode									
Is at Archive Location									
Is At Home									
Is Missing									
Item Approval Date									
Job Title									
Label Print Date									
Label Printed									
Label Printed Date									
Last Login Date									
Last Modified By Barcode									
Last Modified By Description									
Last Modified Date									
Last Name									
Last Transferred By Barcode									
Last Transferred By Description									

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Production; REC SER=Records Series *Tabs/Fields seen only by customers assigned to the RMO or RML role in Gimmel

Export Fields and the Tabs Where They Appear

	ORG*	INDIV*	B	F	DR	MF	FC	IP	REC SER
Last Transferred Date									
Latest File Date									
Legacy Notes									
Legacy Tracking Number									
Legal Citations									
Microform Barcode									
Microform Quick Description									
Months									
Notes									
Notes or Brief Project Description									
Number of Duplicates									
Number of Fiche Pulled									
Number of Items Being Sent									
Number of Pulls									
Organization									
Organization History									
Organization Nickname									
Organization Quick Description									
Organization Status									
Organizations									
Password Creation Date									
Phone Number									
Printed By User Barcode									
Printed By User Description									
Recertification Required									
Record Series Title									
Records Series									
Records Series Quick Description									
Remarks									
Retention Action									
RM Contact Address									
RM Contact Email Address									
RM Contact First Name									
RM Contact Last Name									

ORG=Organizations; INDIV=Individuals; B=Boxes; F=Files; DR=Distaster Recovery; MF=Microforms; FC=Fiche Circulation; IP=Imaging

Production; REC SER=Records Series *Tabs/Fields seen only by customers assigned to the RMO or RML role in Gimmel

Export Fields and the Tabs Where They Appear

	ORG*	INDIV*	B	F	DR	MF	FC	IP	REC SER
RM Contact Phone Number									
RM Contact Title									
RMO Address									
RMO Email Address									
RMO First Name									
RMO Last Name									
RMO Phone Number									
RMO Title									
Role									
RSIN									
Schedule Approval Date									
Secondary Billing Address									
Secondary Billing Email Address									
Secondary Billing First Name									
Secondary Billing Last Name									
Secondary Billing Phone Number									
Security Exclude									
Series Status									
Source Item(s) in storage at the SRC									
Source Item(s) will be stored at the SRC									
Storage									
Sub Business Unit Name									
TSLAC Analyst									
TSLAC Contract Number									
Type of Duplicate									
Type of Government									
User Name									
Vital									
What is being sent to TSL imaging to be imaged?									
What product size is TSL imaging creating?									
What product type is TSL imaging creating?									
Years									

ORG=Organizations; INDIV=Individuals; B=Boxes; F=Files; DR=Distaster Recovery; MF=Microforms; FC=Fiche Circulation; IP=Imaging

Production; REC SER=Records Series

*Tabs/Fields seen only by customers assigned to the RMO or RML role in Gimmal

Supplemental Information: Export Fields and the Tabs Where They Appear

NOTES

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NOTES

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