RMO / RML

Gimmal

Instruction Guide

Electronic Edition

TEXAS STATE LIBRARY AND ARCHIVES COMMISSION

SLRM STATE AND LOCAL RECORDS MANAGEMENT

January 2026

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

IMPORTANT NOTE ABOUT THIS EDITION

This edition is for Records Management Officers (RMO) and Records Management Liaisons (RML). If the Organizations, Individuals, and Disposition Notices are not seen after logging in, the user's role is not RMO or RML in Gimmal. The first 248 pages are the same as the edition for Records Center Users. From Page 249 onward, RMO/RML responsibilities in Gimmal are explained.

It is recommended that the instructions in this guide be followed step by step for any process completed in Gimmal 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 Gimmal 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 Gimmal 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 Gimmal to confirm the current edition of the guide.

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Introduction to Gimmal

What is Gimmal?

The modernization of TexLinx into Gimmal 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 Gimmal 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, Gimmal 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 Gimmal?

- 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 Gimmal 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 Gimmal 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 Gimmal. Please see ***Supplemental Information: Timer*** (Page 191).

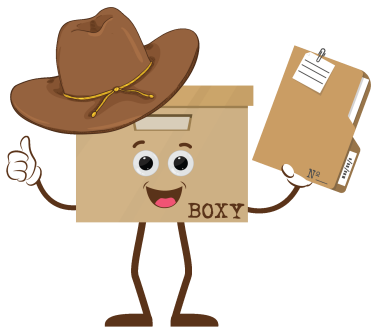
What is this manual?

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 Gimmal 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

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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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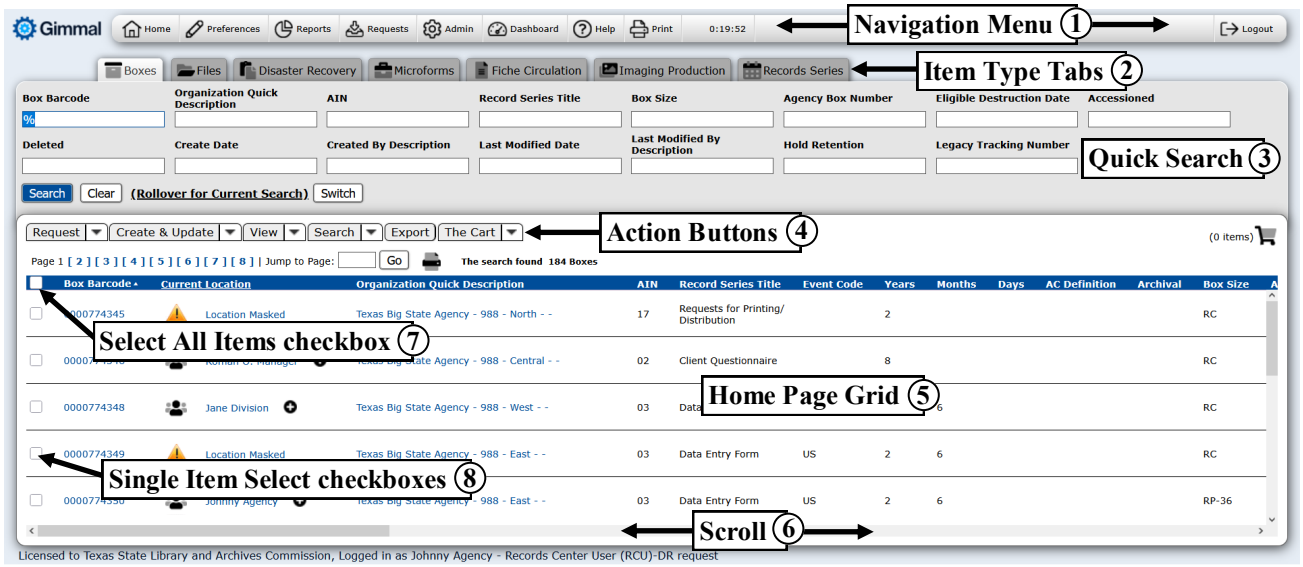
Gimmal Home Page



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 Gimmal 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 Gimmal.

2. **Item Type Tabs:** These are the program tabs available in Gimmal. 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.

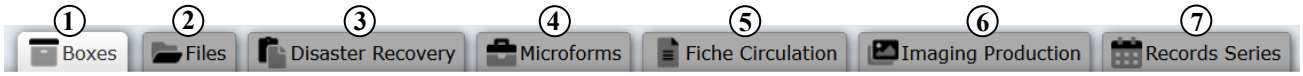
7. **Select All Items Checkbox:** Select the checkbox on the left edge of the column headers ribbon to choose all items on this page for an option in the Action Buttons. This checkbox selects only the items on the current screen page. This checkbox does not select any items on other screen pages. Moving 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).

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 Gimmal password prior to the required 90-day reset. Please see ***Supplemental Information: Change Gimmal 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 Gimmal.
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 Gimmal.

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.

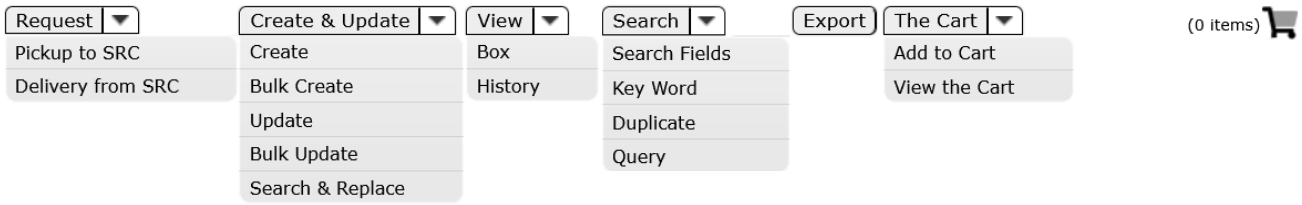
Switch: This pivots between a field specific search and a search term for all fields in the system.

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

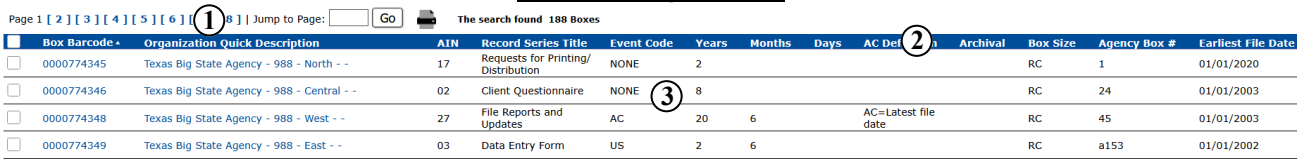
Export items from Gimmal to a data editor program/worksheet on the client's computer.
Please see ***Supplemental Information: Export*** (Page 221).

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



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]: 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

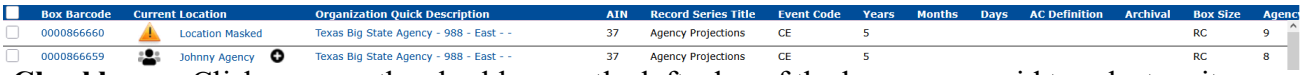
The column headers in the ribbon vary from tab to tab and horizontal scrolling (left or right) may be needed to see all columns, but the checkbox column and barcode column remain visible to the left when scrolling horizontally. The ribbon here is illustrated to show all column headers for the Boxes tab,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

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



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.

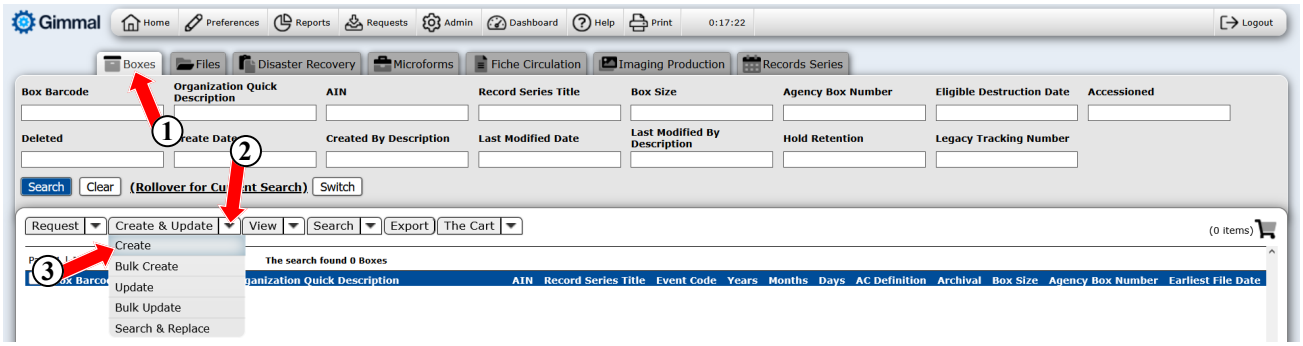
- Location Masked in Current Location means the item is at to the SRC (or is on the way to the agency). The exact location for an item at the SRC is not disclosed for security reasons.
- RoMOna Manager in Current Location means the item is with an agency employee (or it is on the way to the SRC).
- 0001252555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

NOTES

Boxes: Use ‘Create’ to Add Boxes

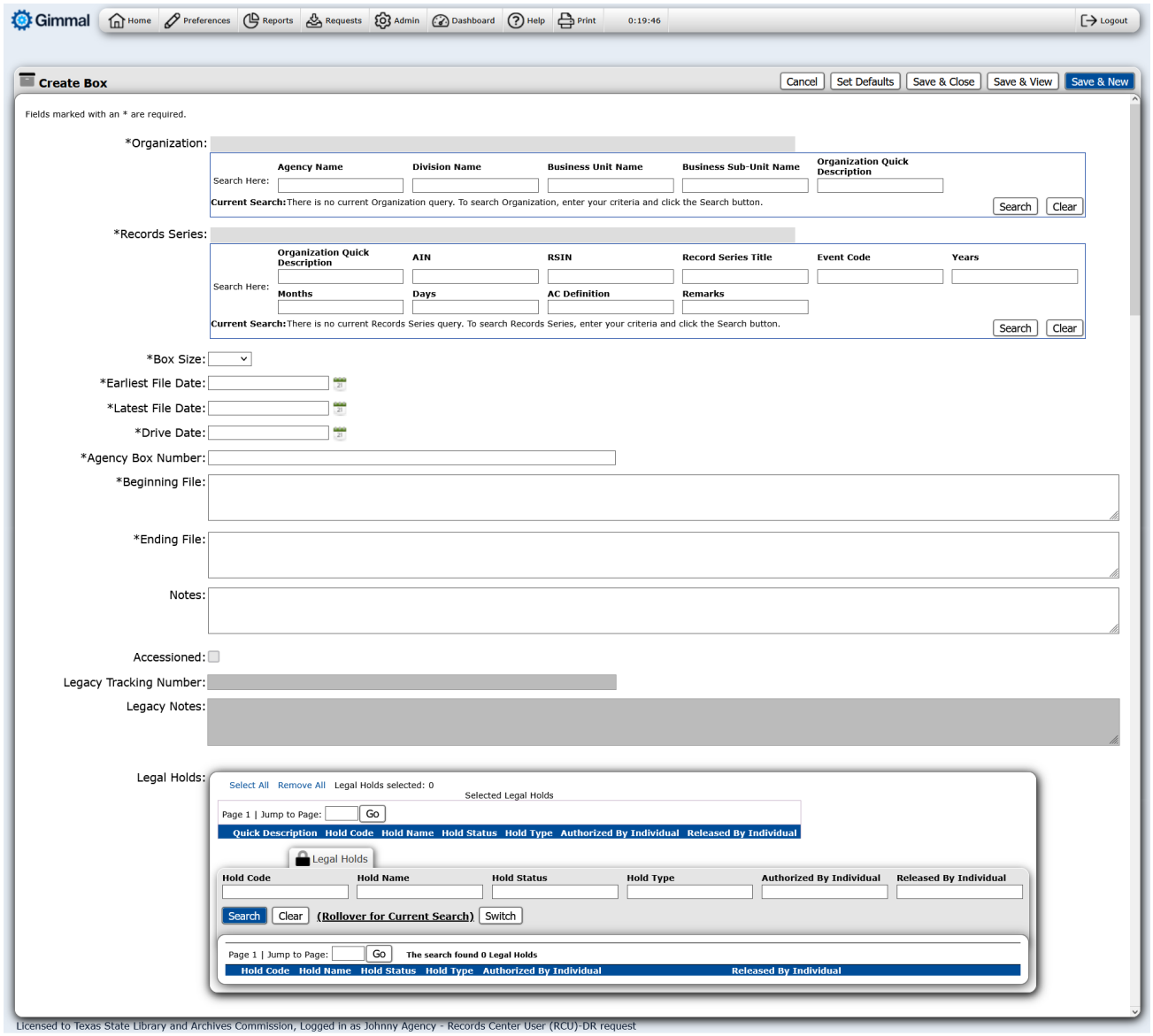
Create is used to create one box or several boxes, one item at a time.
BOXYBIT *There are a couple of ways for a client to create boxes in Gimmal (as illustrated in this guide); this is the preferred method to create any number of boxes.*

Create a box



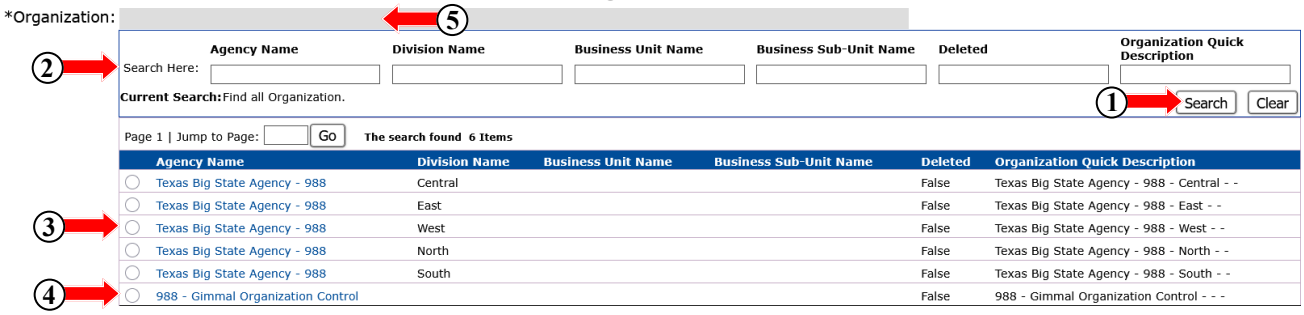
1. Click once on the **Boxes** item type tab.
2. Click once on **Create & Update** in the Action Buttons.
3. Click once on **Create** from the dropdown menu.

Create Box screen



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

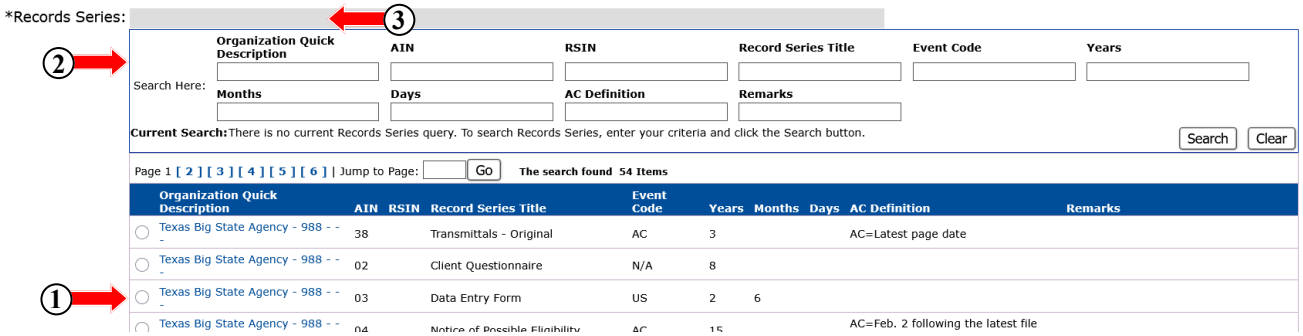
*Organization



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

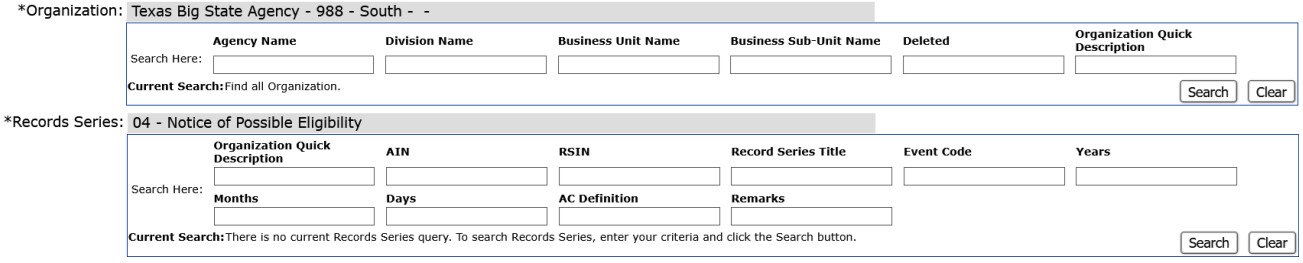


Records Series is a combination of Agency Item Number (AIN) and Record Series Title on the agency's Records Retention Schedule. The item created in Gimmal must have a Records Series assigned to it. Select the Record Series Title by clicking once **(1)** on the radio button at the left side of the screen. 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.

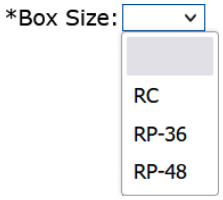
BOXYBIT *Is the needed Record Series missing? Contact the agency's Records Management team.*

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

How these fields look when completed:



*Box Size



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

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

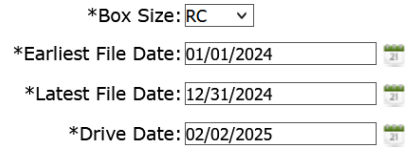
*Latest File Date

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

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:



*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

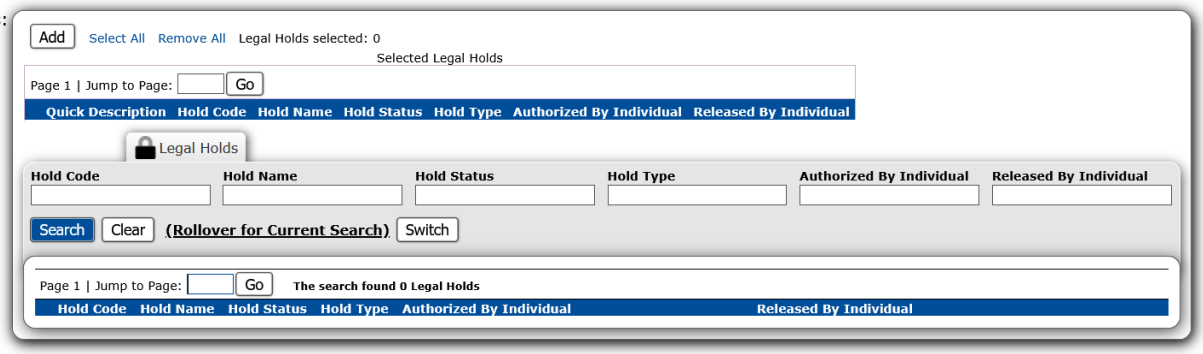
*Ending File: Ybarra, Julio

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

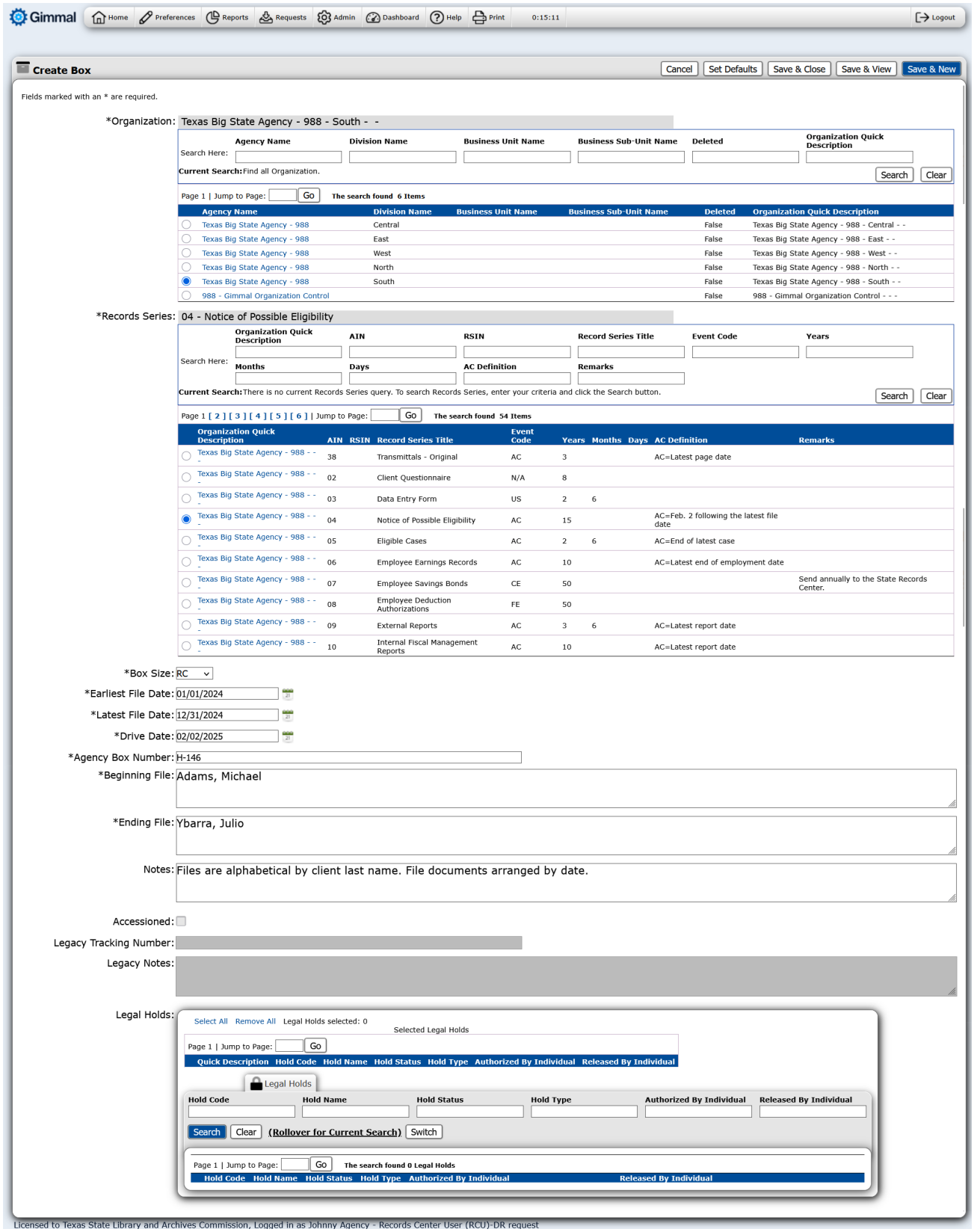
Legal Holds

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.*

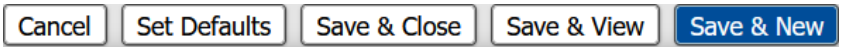
Legal Holds:



Completed: Create Box screen:



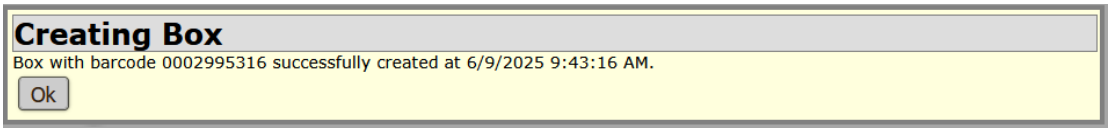
Save Options



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

Boxes: Use ‘Create’ to Add Boxes

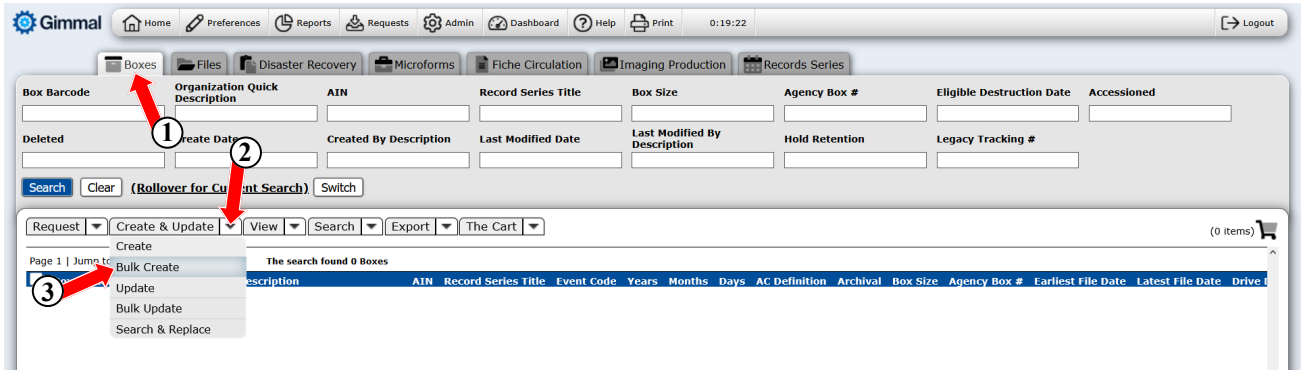
NOTES

Boxes: Use ‘Bulk Create’ to Add Boxes

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

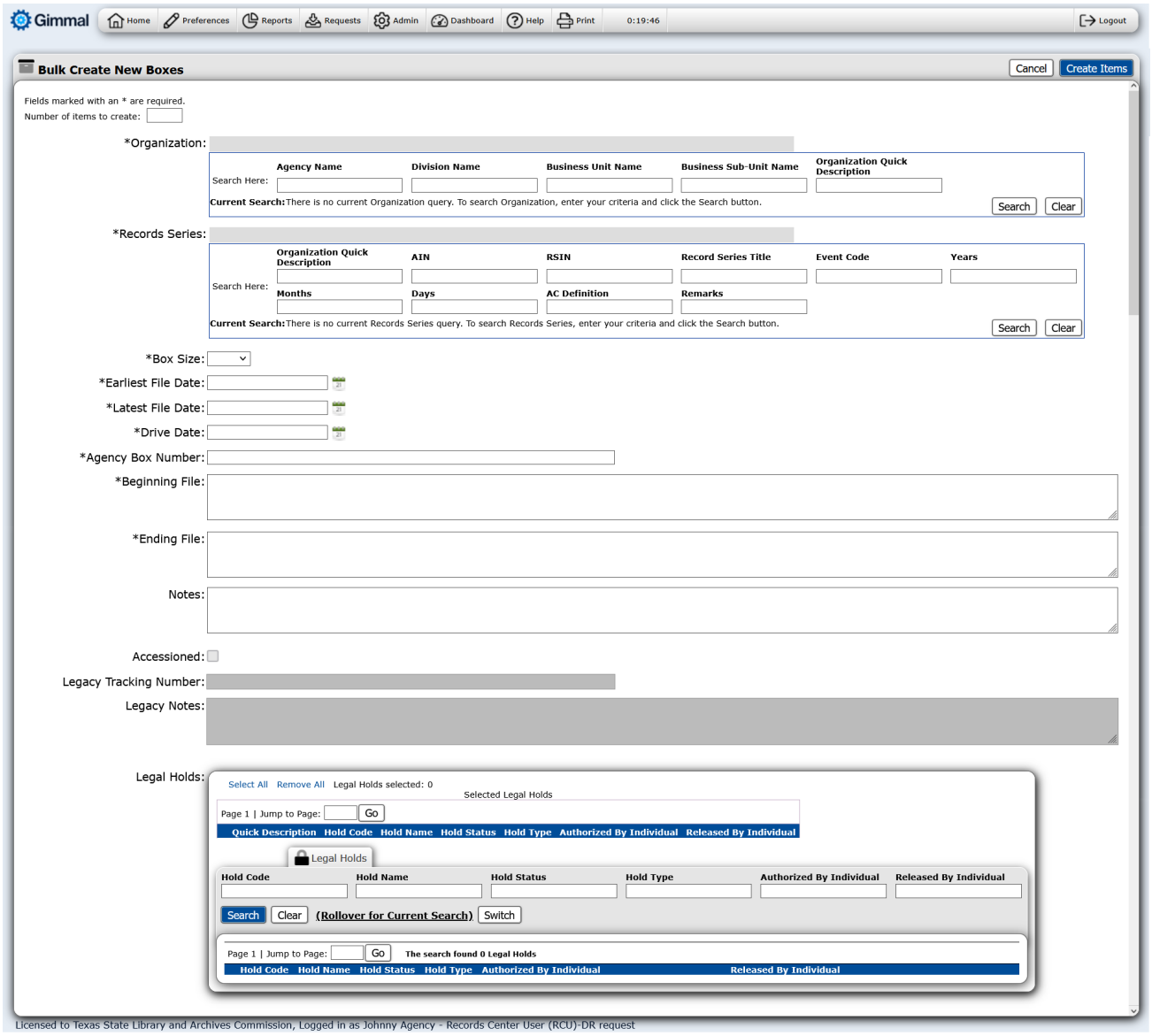
BOXYBIT *The boxes are created for the same Organization and the same Record Series. The data entry for the first box applies to all of the boxes; the data fields for each box can be modified later.*

Bulk Create boxes



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.

Bulk Create New Boxes screen



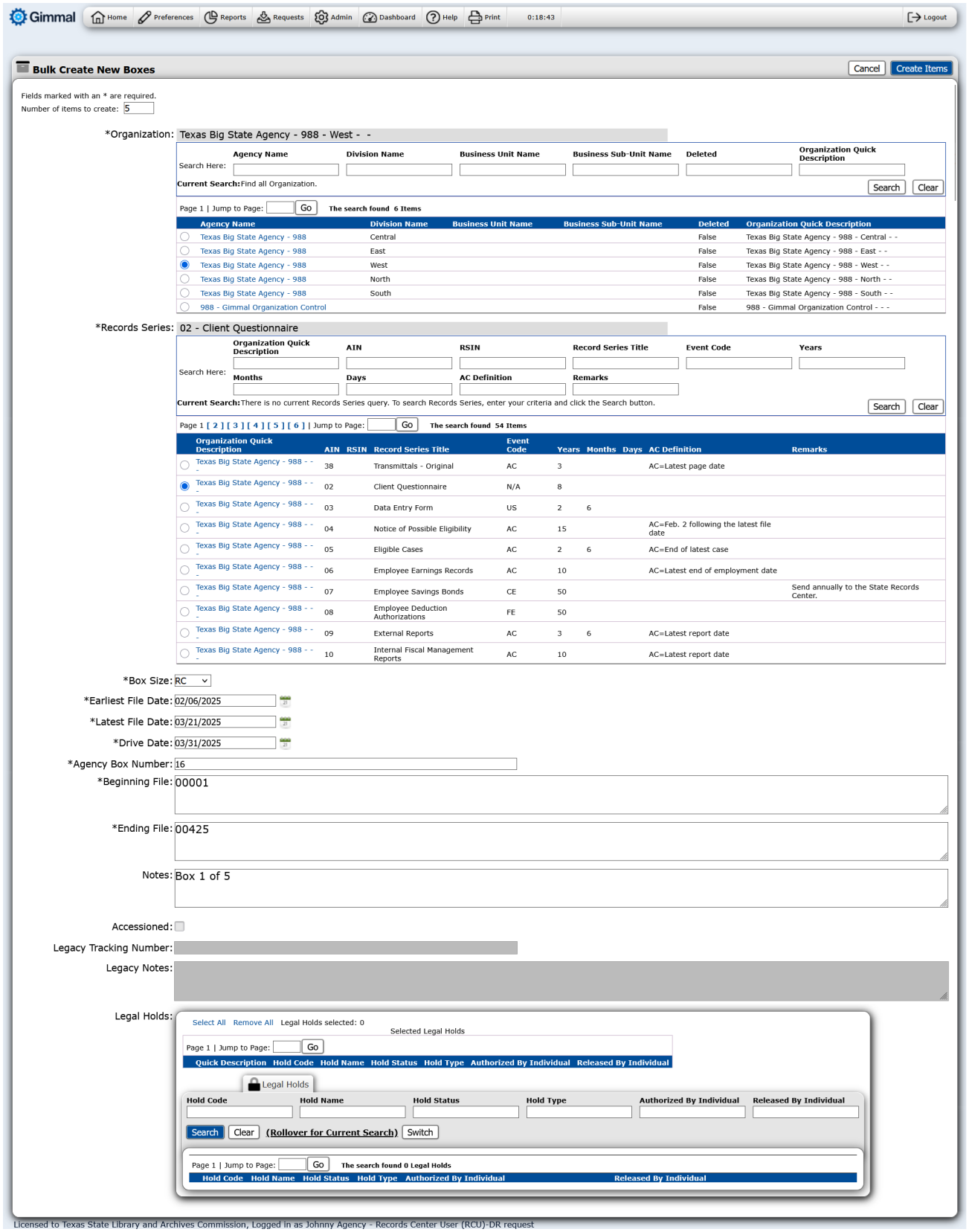
Number of items to create

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.*

Completed: Bulk Create New Boxes screen:

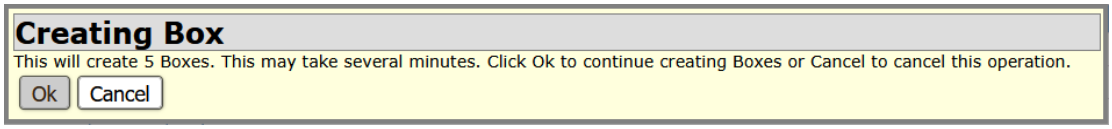


Save

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:

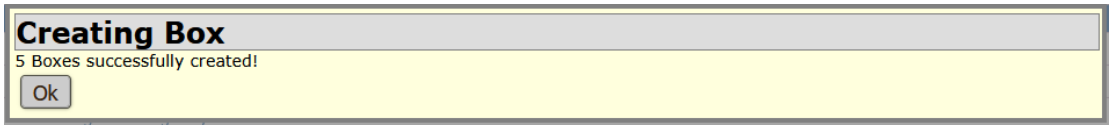
- **Cancel**: Click once to cancel the create process for these items. They will not be saved.
- **Create Items**: Click once to create the boxes.

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 Gimmal will duplicate the number of boxes being created. If duplicate boxes are created, send an email to gimmal@tsl.texas.gov and include a list of the box barcodes to be deleted. Do not send a screengrab image.*



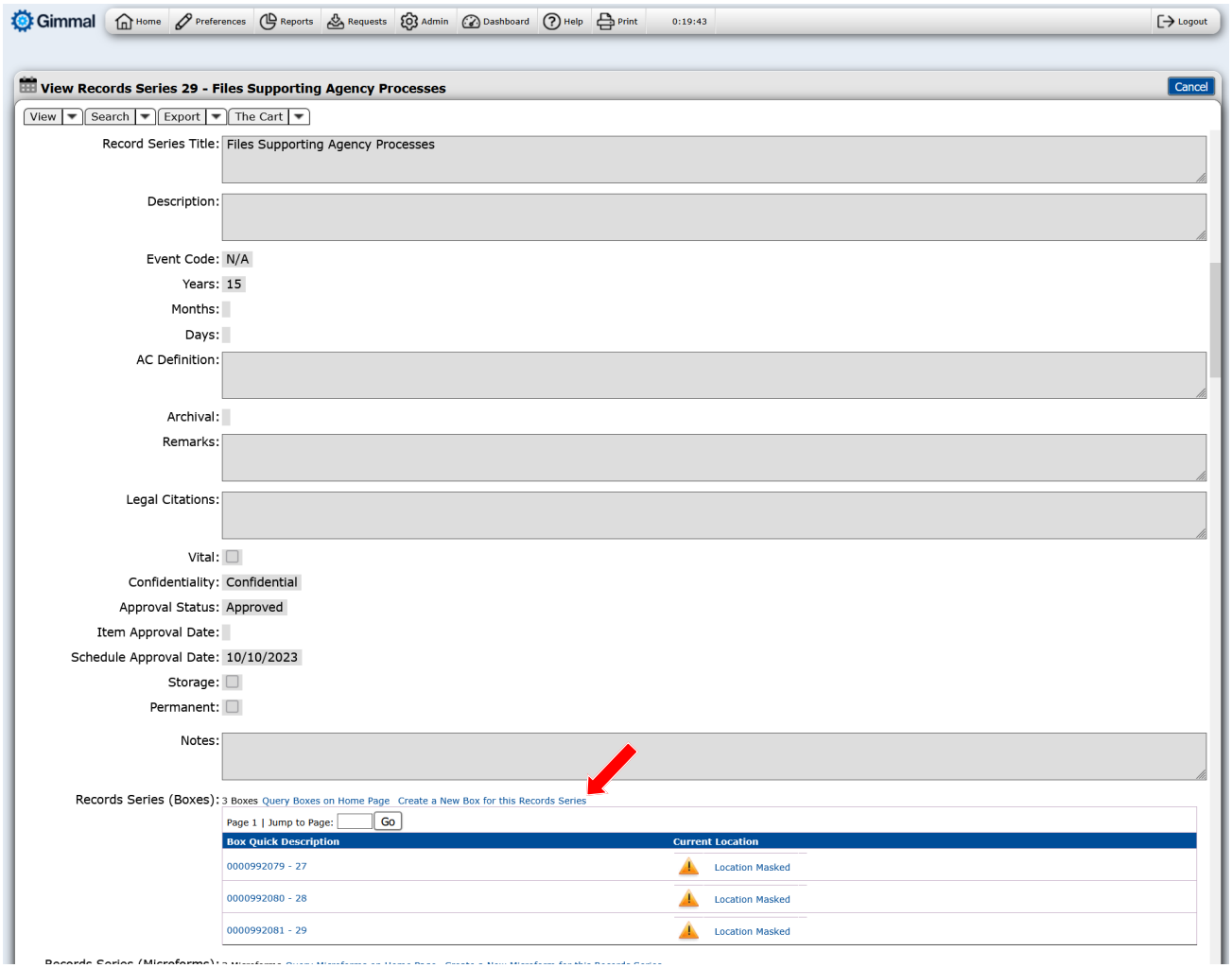
The create progress bar will display. When the above message appears, Click once on **Ok**. Then, turn to ***Request Pickup: Send/Return Items to the SRC*** (Page 93) to have the boxes picked up by the SRC.

NOTES

NOTES

Boxes: Do Not Use Records Series Tab to Add Boxes

View Records Series

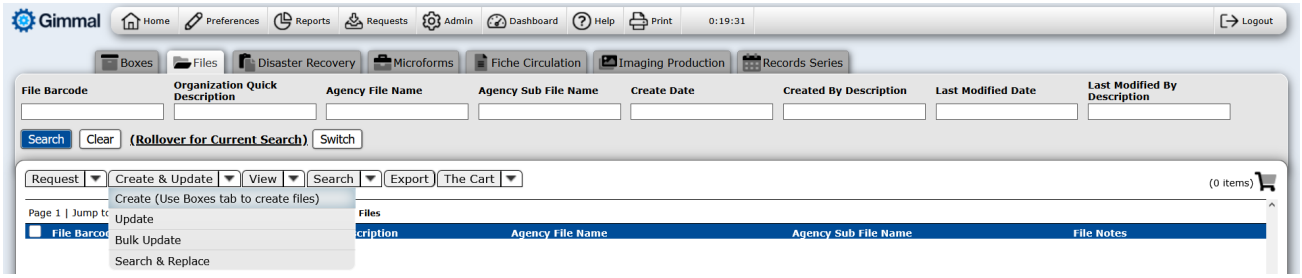


The functionality for creating items on from the Records Series tab does not work. Please do not use this method to create items.

Boxes: Do Not Use Records Series Tab to Add Boxes

NOTES

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.**

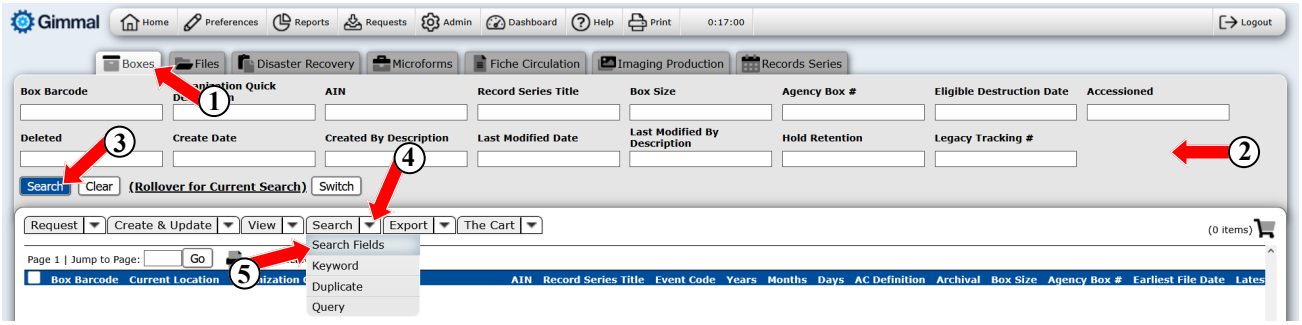
BOXYBIT ***The SRC does not require the client to create file information in Gimmal.***

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

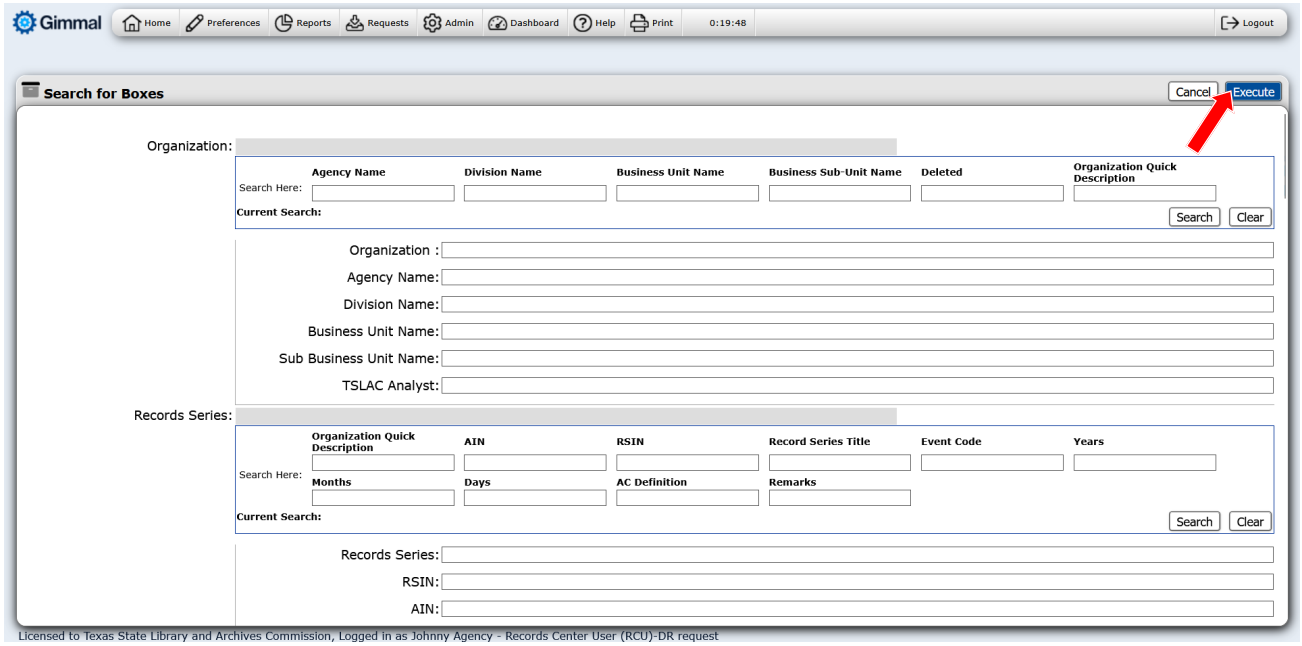


Search for the box to create the file(s):

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.

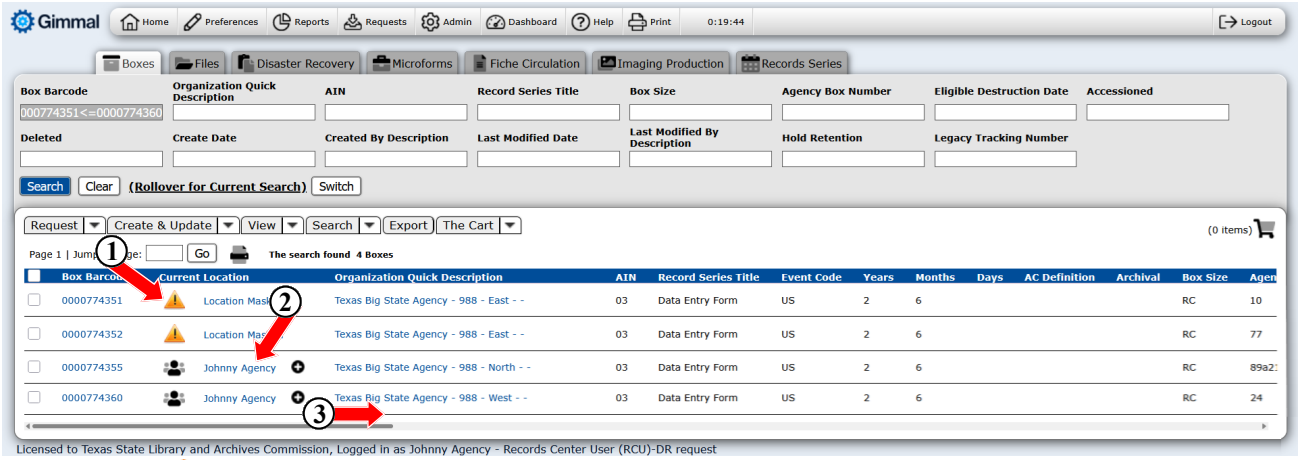
BOXYBIT *Please see* **Supplemental Information: Search** *(Page 169) for tips on how to Search.*

Search Boxes screen



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

Review information for the box



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.

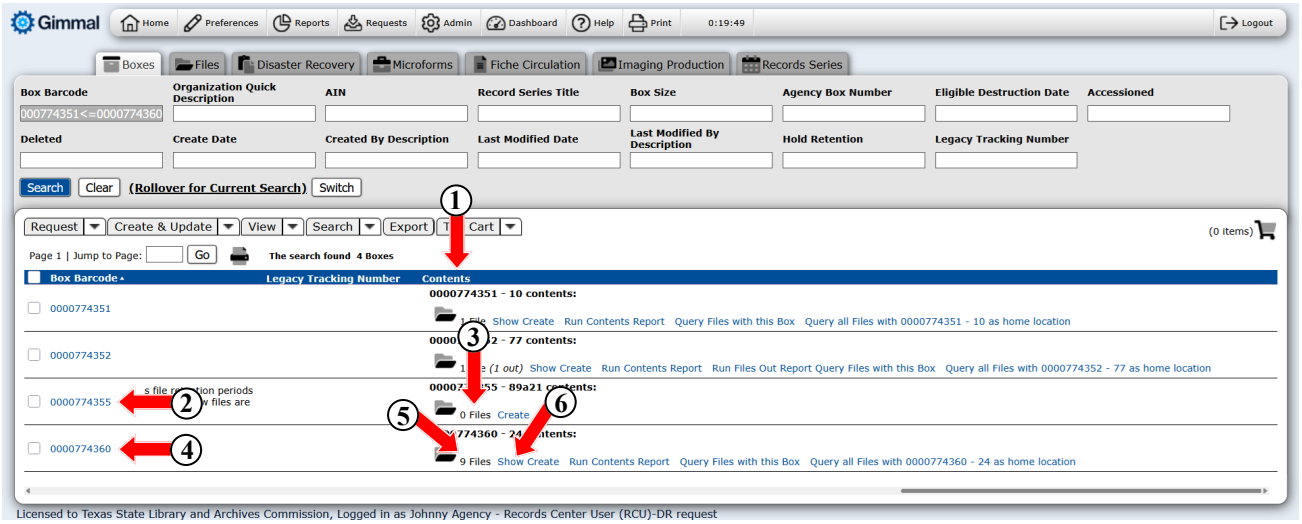
Review the following data fields for the box:

- **Organization**: Make sure the Organization for the box is the same as the fiel. 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 Tile 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.

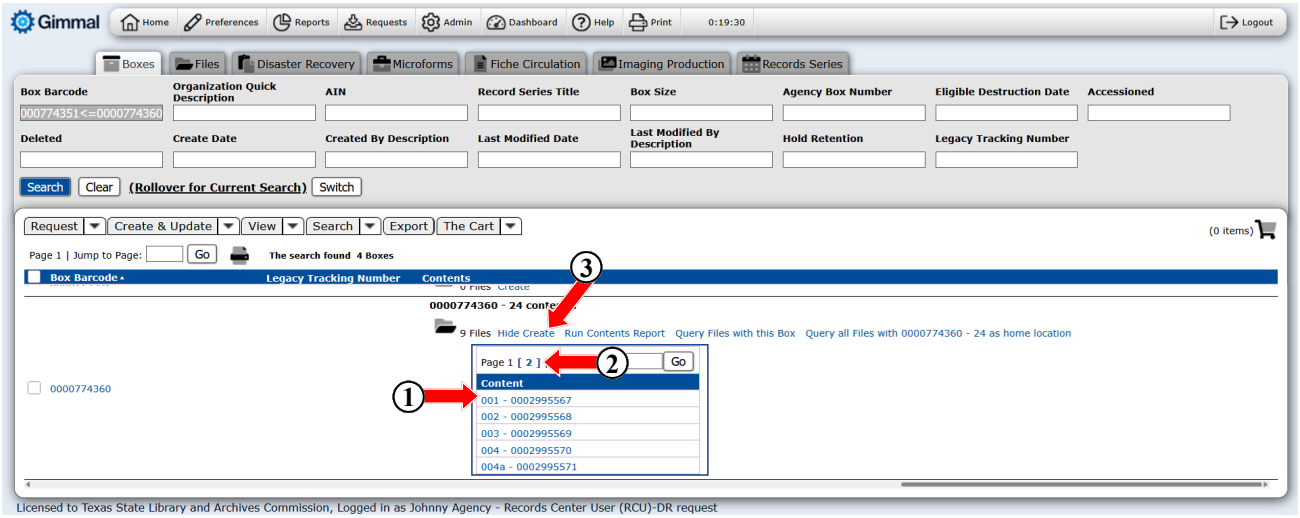
The box Contents column



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.

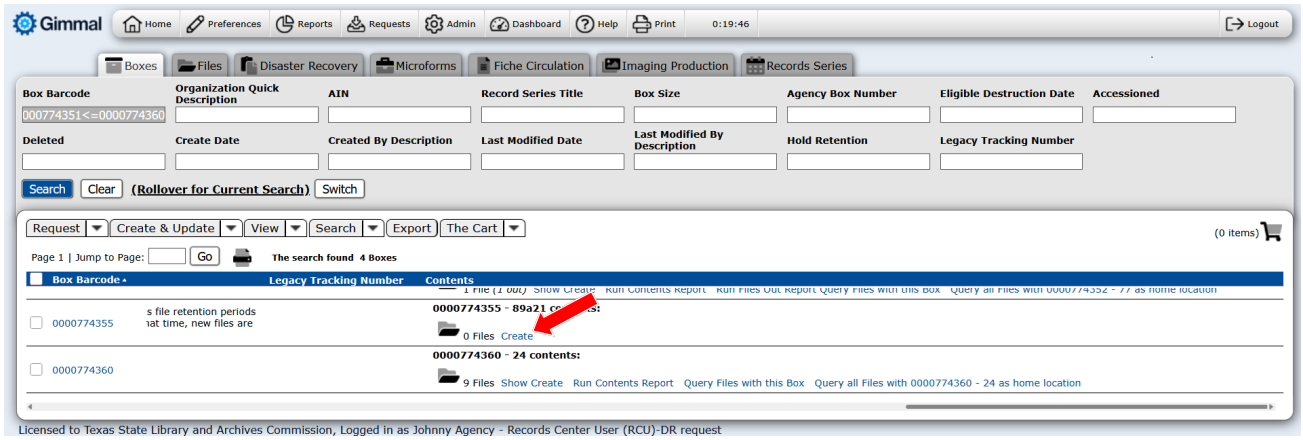
Sometimes, though, there will be files in Gimmal for a box. Look at Box Barcode 0000774360 **(4)**. The Contents column **(5)** shows it has nine files in Gimmal. To avoid duplicating a file name in a box, click once **(6)** on **Show** to see an inventory for the file names assigned to this box.

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



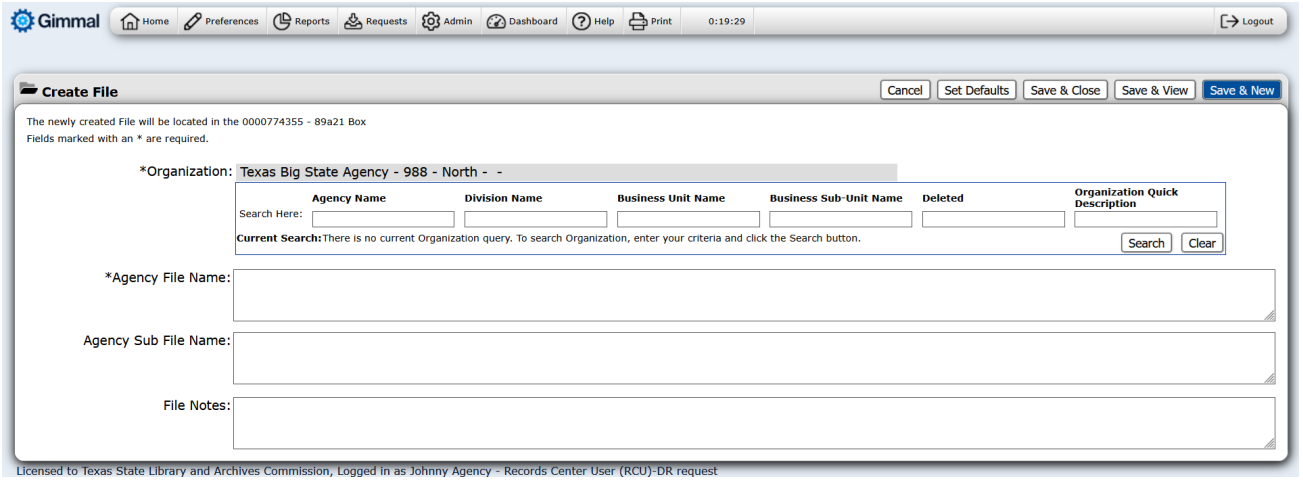
When **Show** is clicked, an inventory popup window displays. The Content column **(1)** in the popup has the Agency File Name followed by the File Barcode and the number of pages **(2)**. Confirm the File Name is not listed. To add a new file to this box, click once **(3)** on **Create**.

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

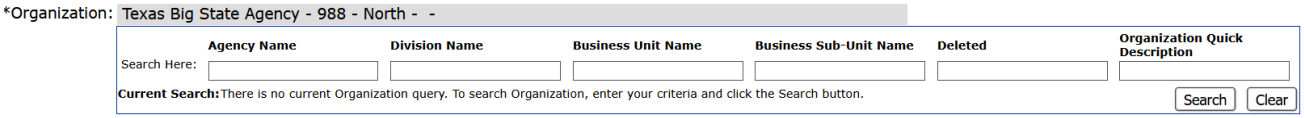


To add a file to this box that has no files in Gimmal, click once on **Create**.

Create File screen



*Organization



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 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

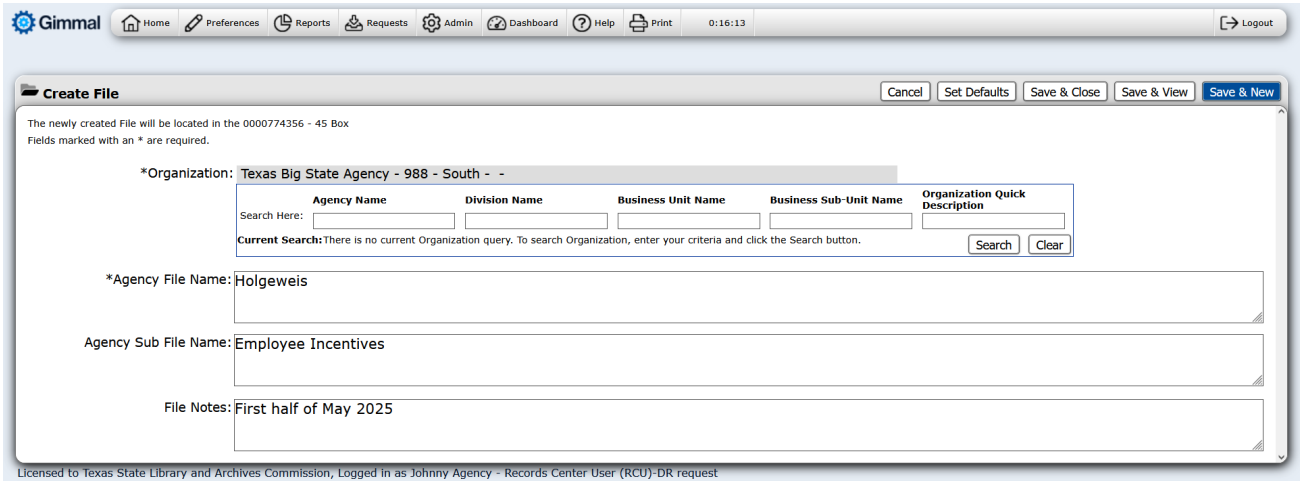
Agency Sub File Name

Agency Sub File Name 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

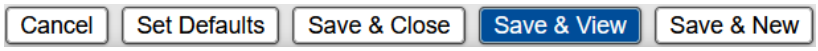
File Notes

File Notes 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



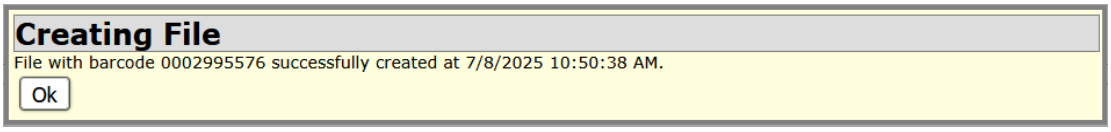
Save Options



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.

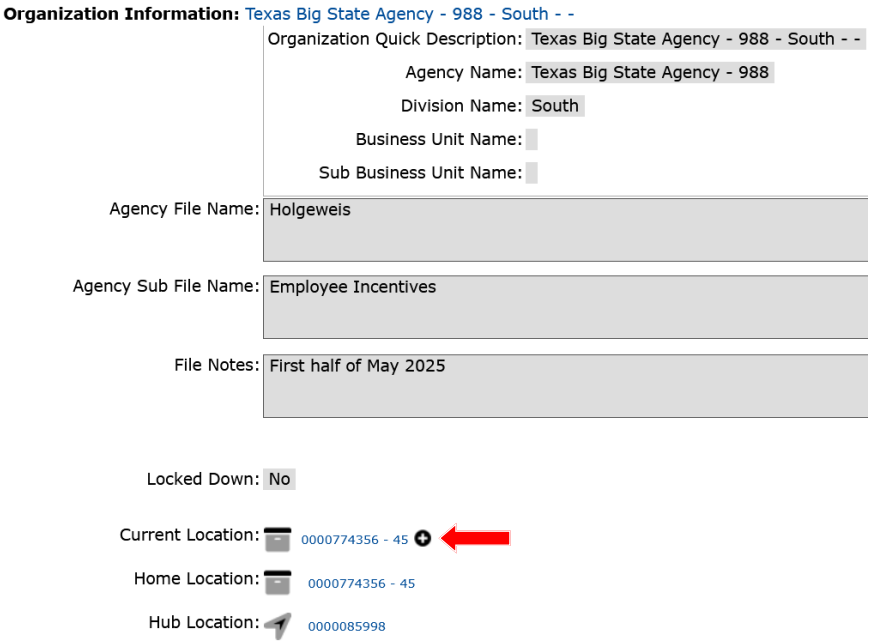
Creating File information



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.



NOTES

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.

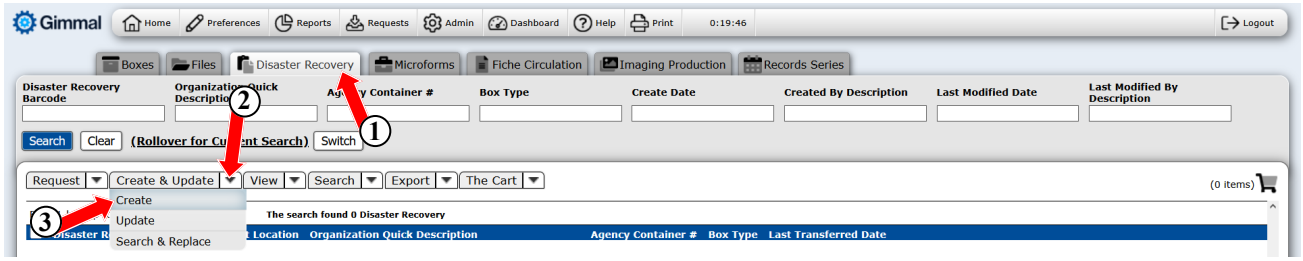
The Disaster Recovery Vault at the SRC is available to all state agencies as an off-site storage location for disaster recovery items and items associated with an agency's Continuity of Operations Plan (COOP) or Business Continuity Plan as stated in Texas Labor Code §412.054.

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

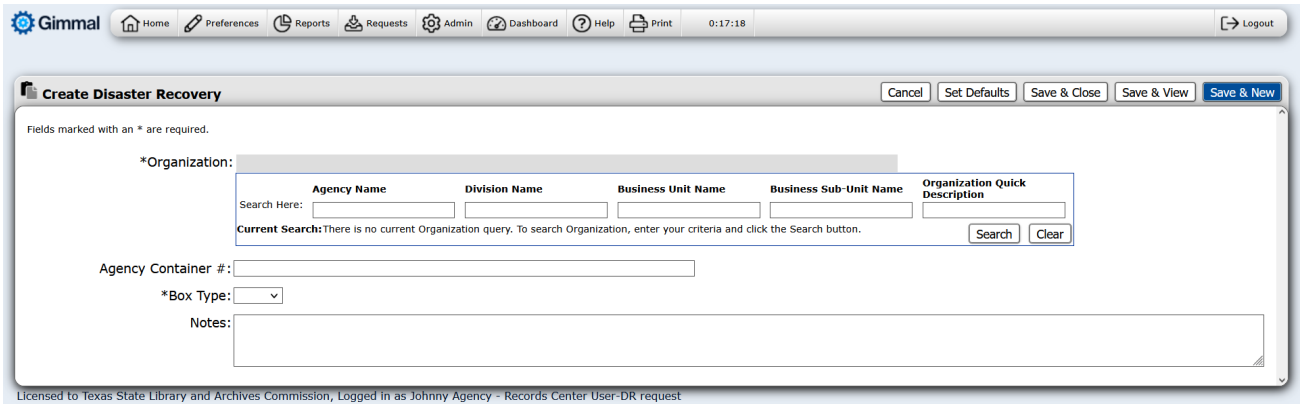
In the event of emergency after-hours access to Disaster Recovery storage, please refer to the **Disaster Recovery After-Hours Access Information** document found on this webpage:
https://www.tsl.texas.gov/slrm/storage

Create a disaster recovery box



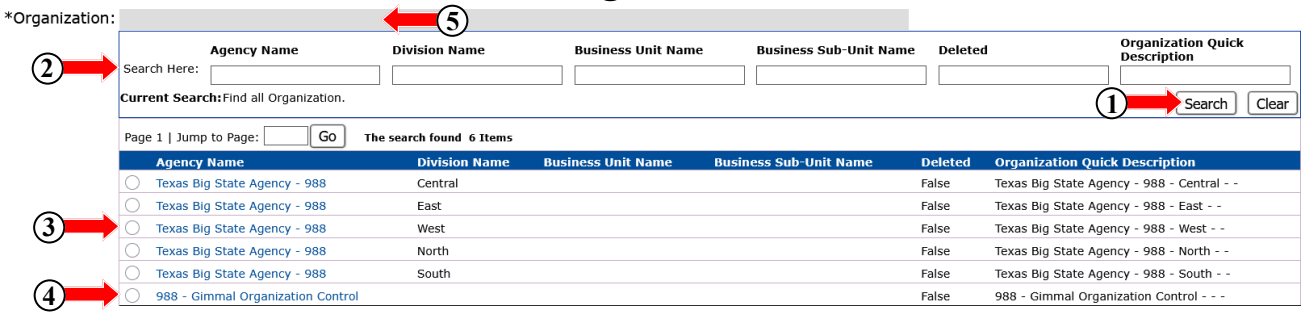
1. Click once on the **Disaster Recovery** item type tab.
2. Click once on **Create & Update** in the Action Buttons.
3. Click once on **Create** from the dropdown menu.

Create Disaster Recovery screen



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

*Organization



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.

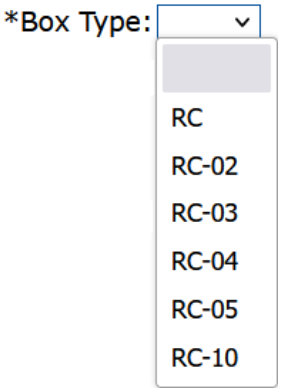
BOXYBIT *Is the needed Organization missing? Contact the agency's Records Management team.*

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 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.

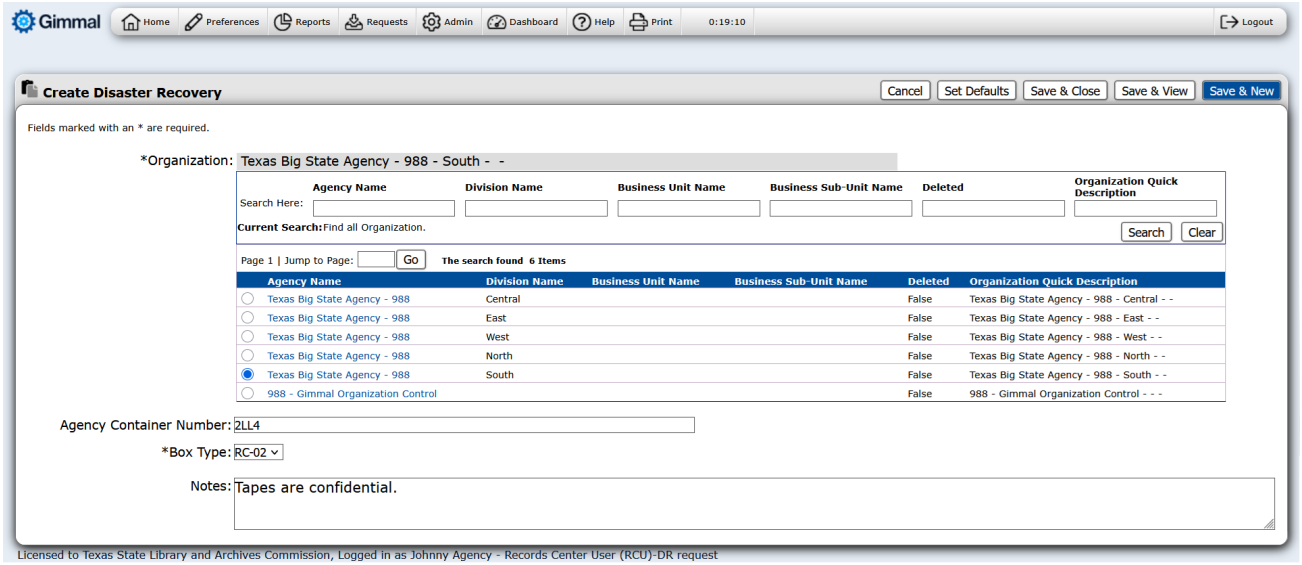
BOXYBIT *The SRC employee will confirm Box Type and make a correction, if needed.*

Notes

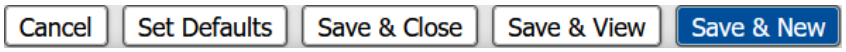
Notes:

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.

Completed: Create Disaster Recovery screen:



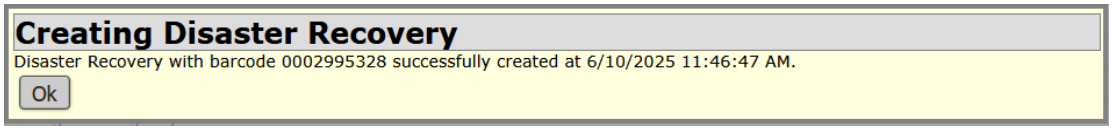
Save Options



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 Gimmal. 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

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.*

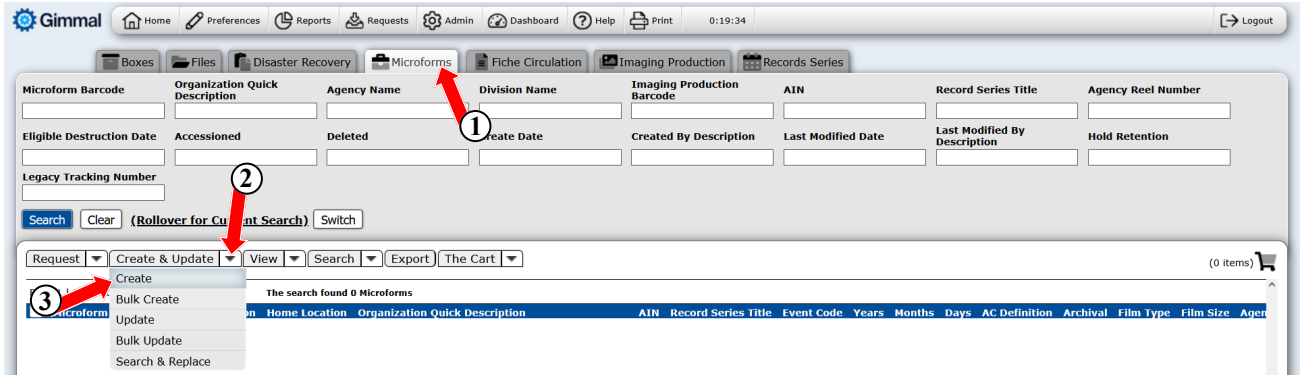
Some information about microforms

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)

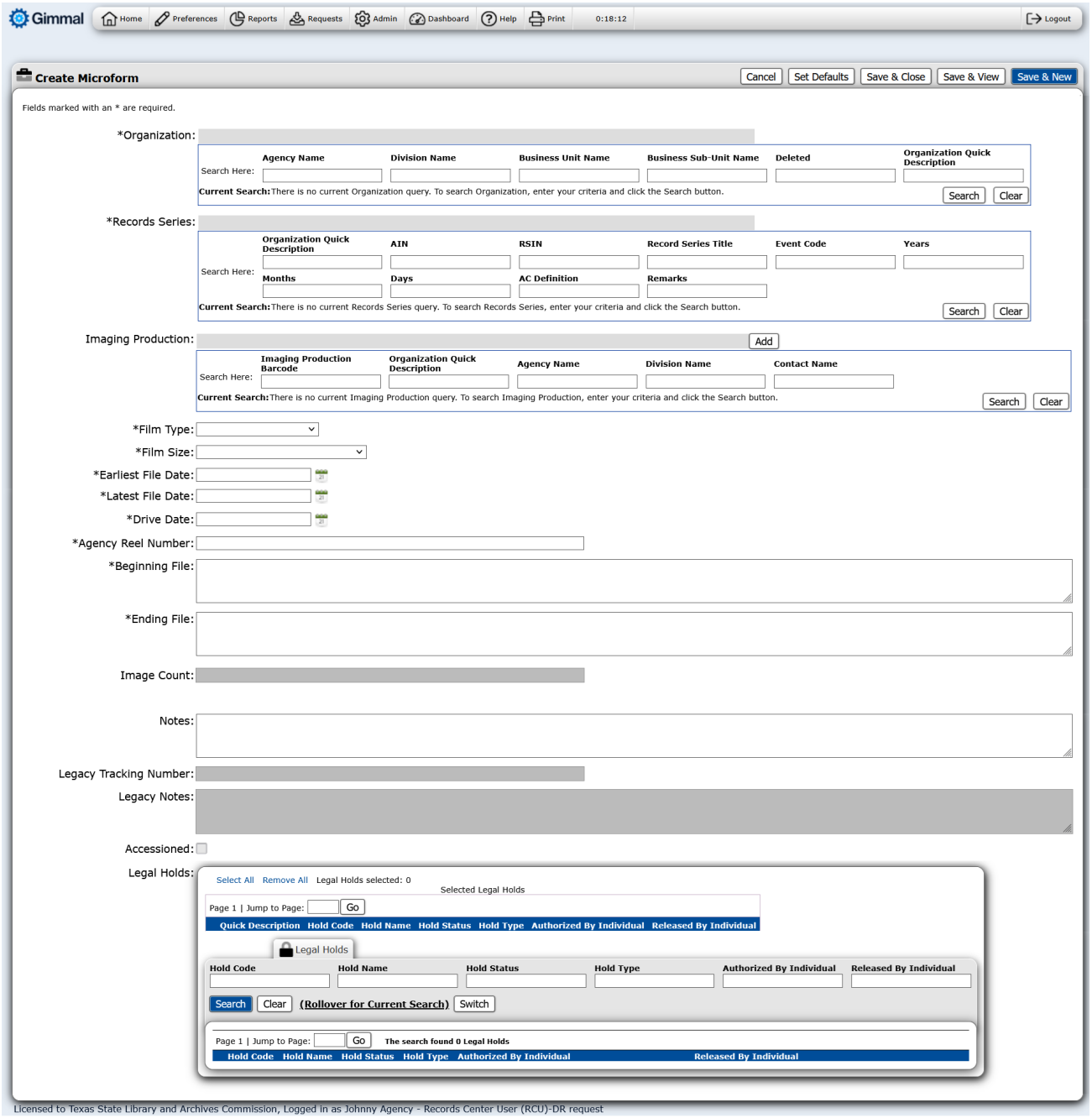
Create a microfilm reel



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.

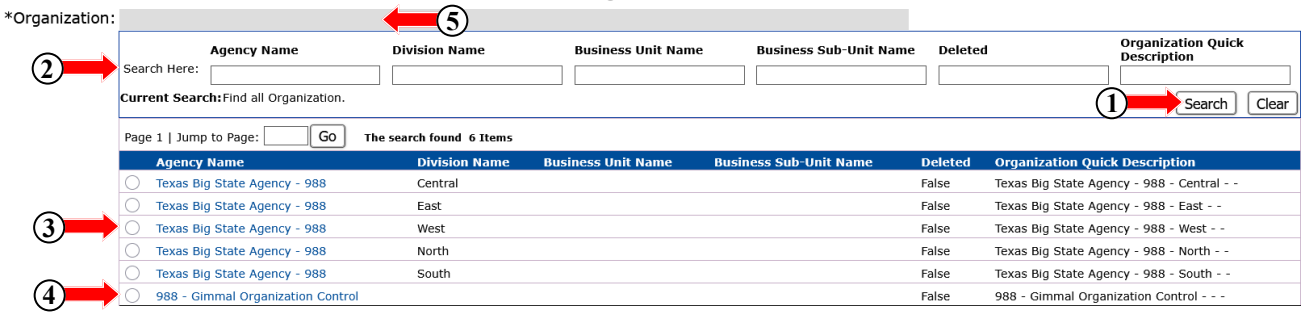
Microfilm: Use ‘Create’ to Add Reels

Create Microform screen



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

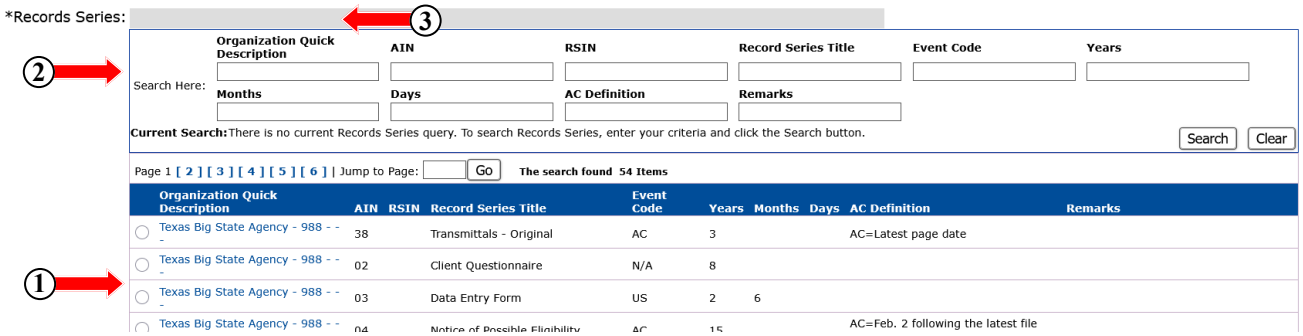
*Organization



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

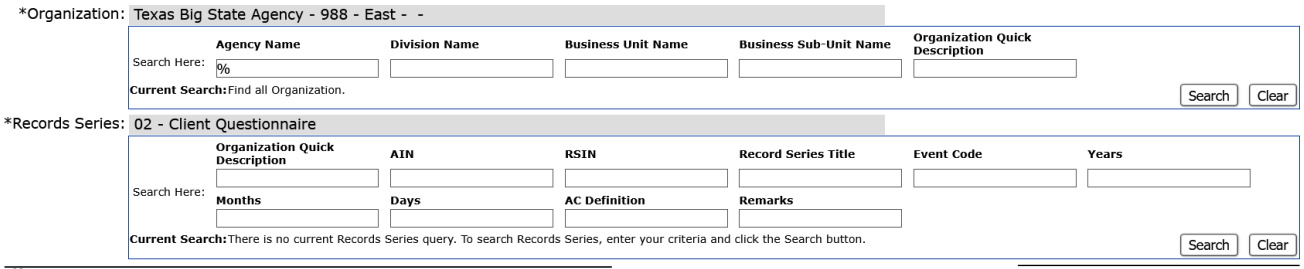


Records Series is a combination of Agency Item Number (AIN) and Record Series Title on the agency's Records Retention Schedule. The item created in Gimmal must have a Records Series assigned to it. Select the Record Series Title by clicking once **(1)** on the radio button at the left side of the screen. 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.

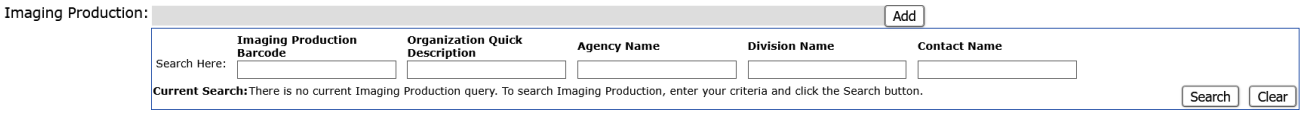
BOXYBIT *Is the needed Records Series missing? Contact the agency's Records Management team.*

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

How these fields look when completed:

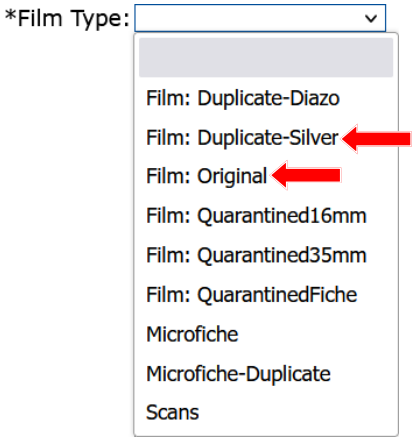


Imaging Production



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

*Film Type

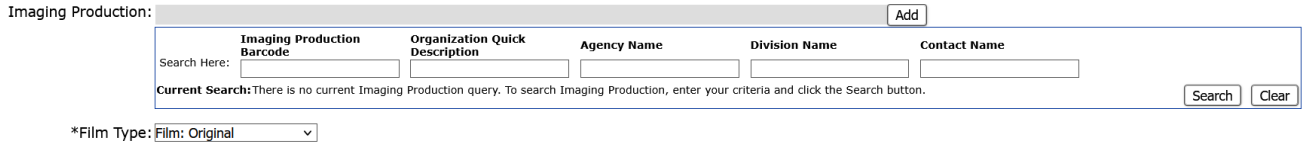


Film Type: The only two options for microfilm storage at the SRC are (select one):

- **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:



*Film Size

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

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

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:

*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: 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

Notes

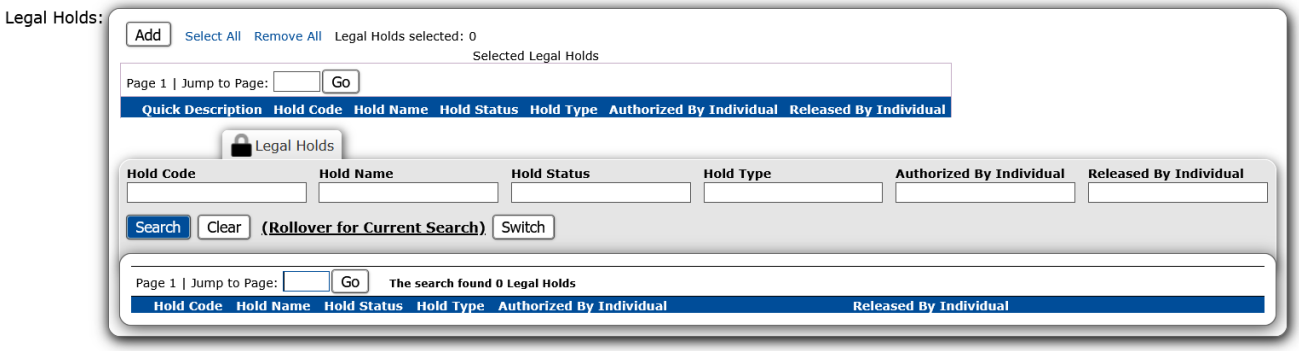
Notes is an optional field for additional information about this microfilm reel. Any character can be used except for the Pipe symbol. Do not press the Enter/Return key on the keyboard.
Data Example: Employee surveys for HR.

Disregard these fields

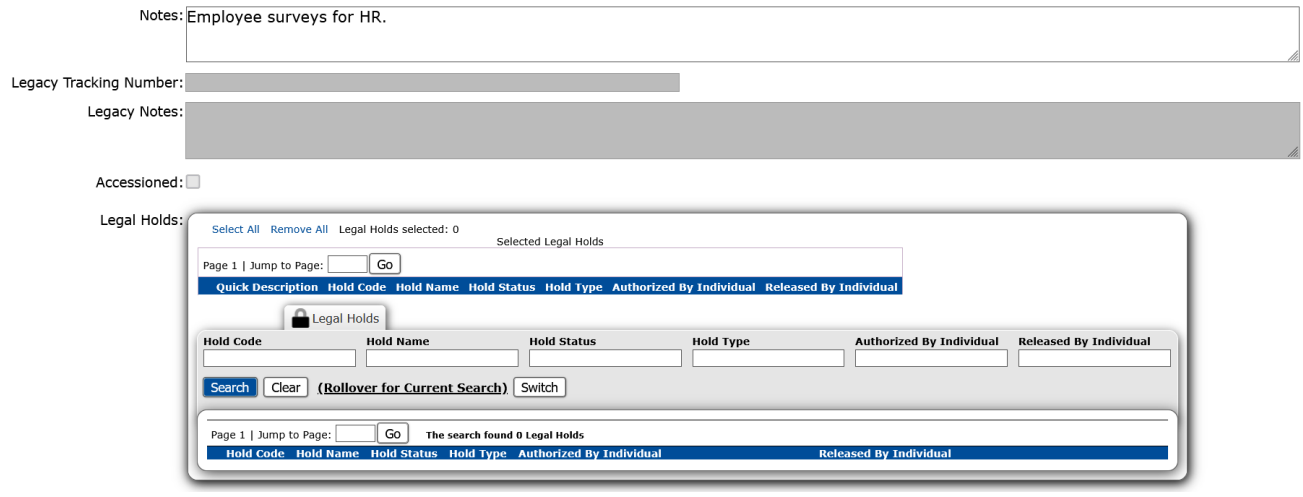
Legacy Tracking #, **Legacy Notes**, and **Accessioned** are fields that cannot be data entered. The software does not allow them to be hidden during this process.

Legal Holds

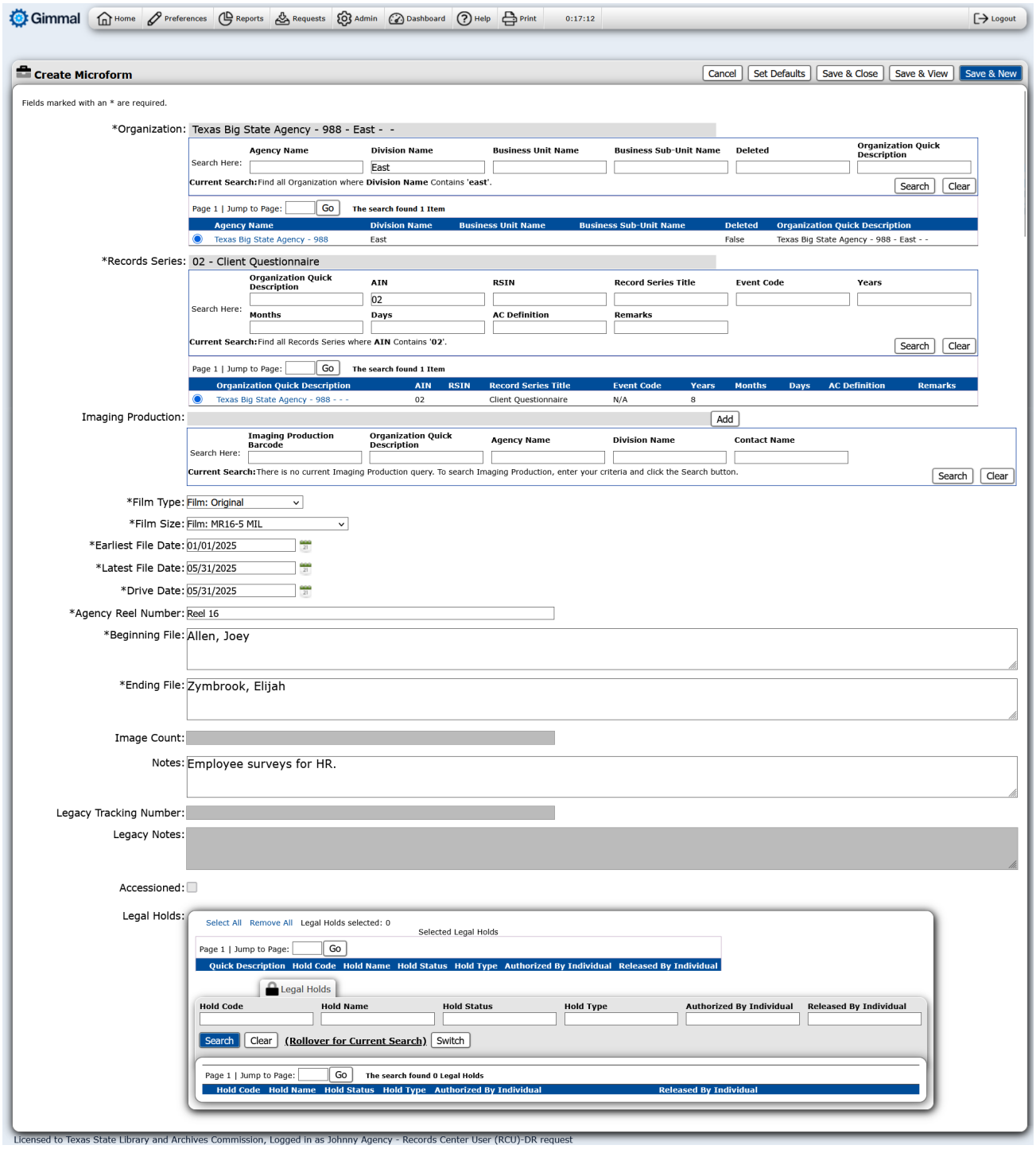
The **Legal Holds** section is provided to place items on hold to keep them from being eligible for destruction. *Please see* **Supplemental Information: Hold** *(Page 197). This is usually done as an update at a later date.*



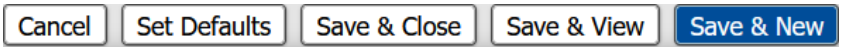
How these fields look when completed:



Completed: Create Microform screen:



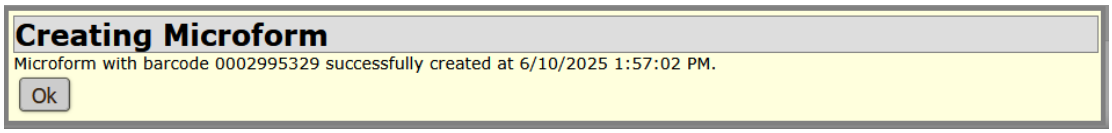
Save Options



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 Gimmal. 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 Gimmal. 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

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.*

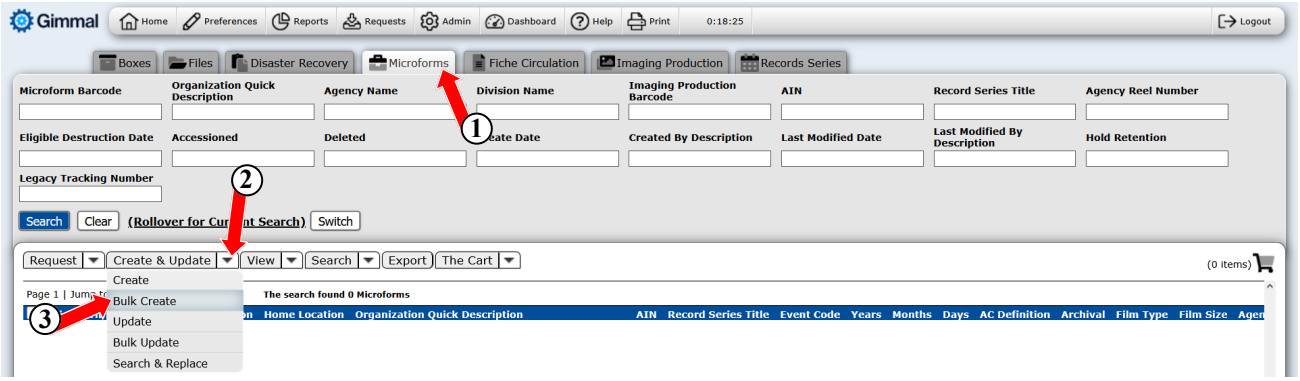
Some information about microforms

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)

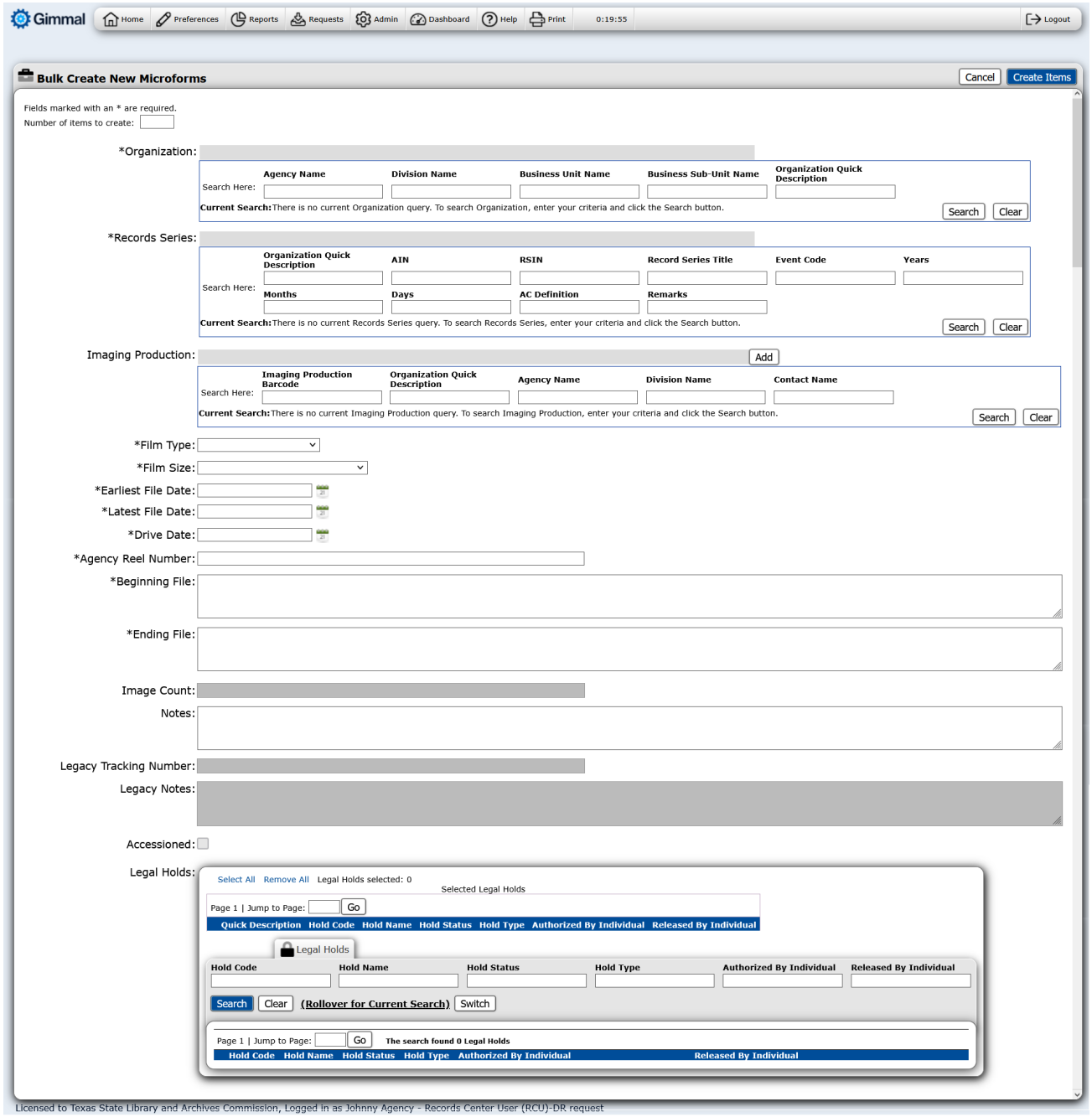
Bulk Create microfilm reels



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



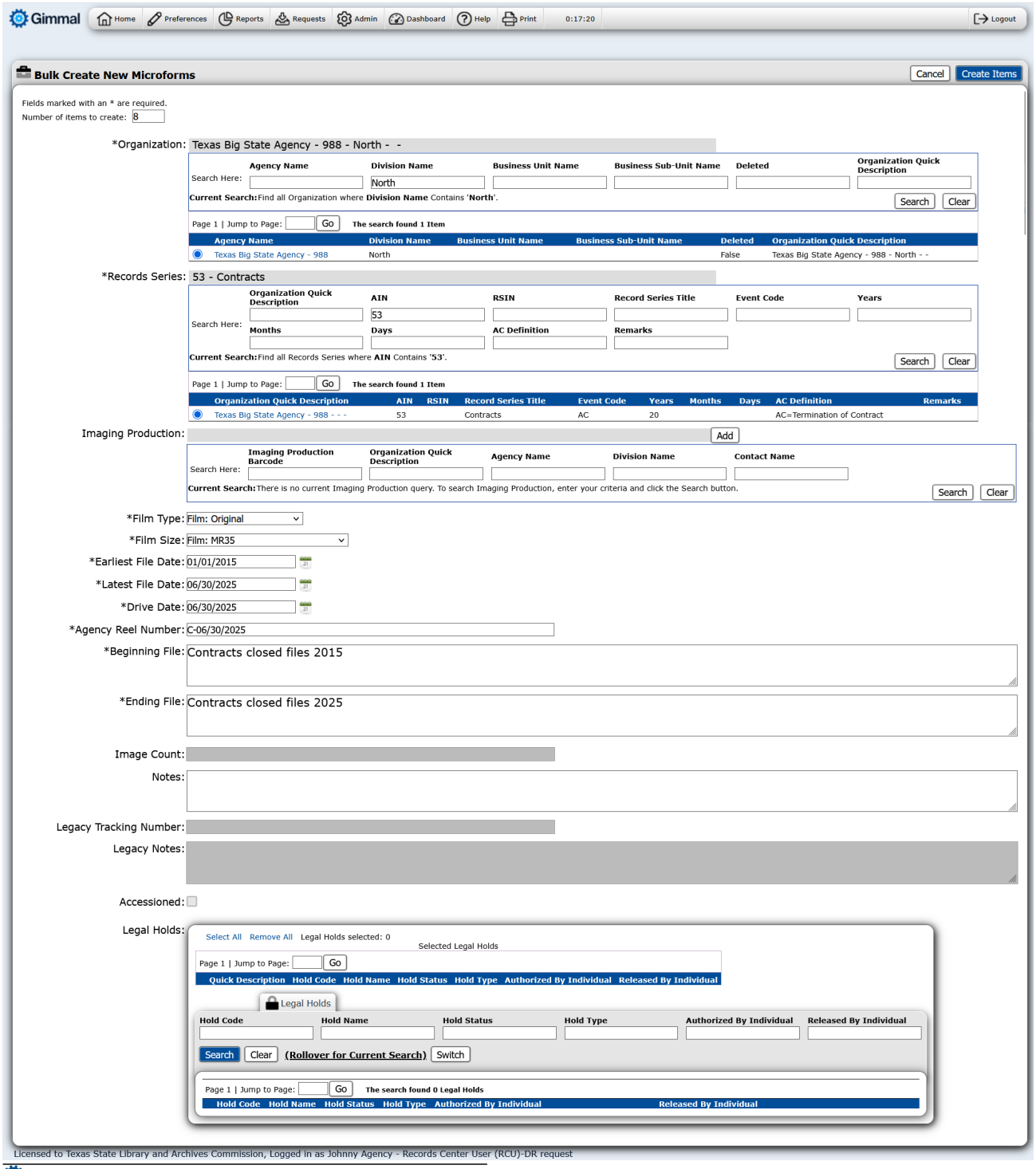
Number of items to create

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:

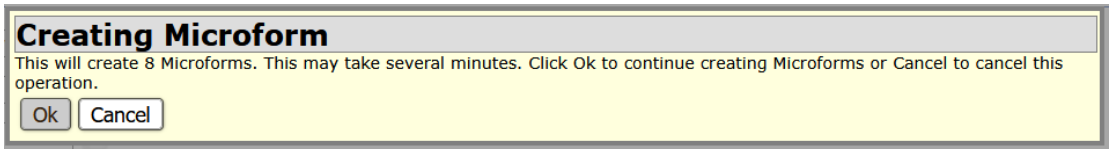


Save

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:

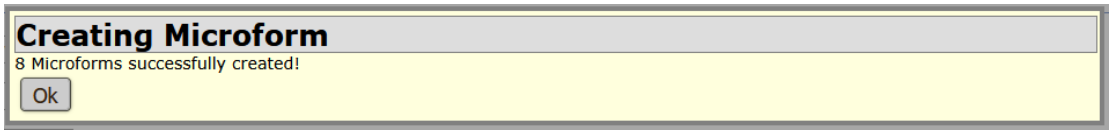
- **Cancel**: Click once to cancel the create process for these items. They will not be saved.
- **Create Items**: Click once to create the microfilm reels.

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 Gimmal will duplicate the number of reels being created. If duplicate reels 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 microfilm reels picked up by the SRC.

NOTES

NOTES

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)

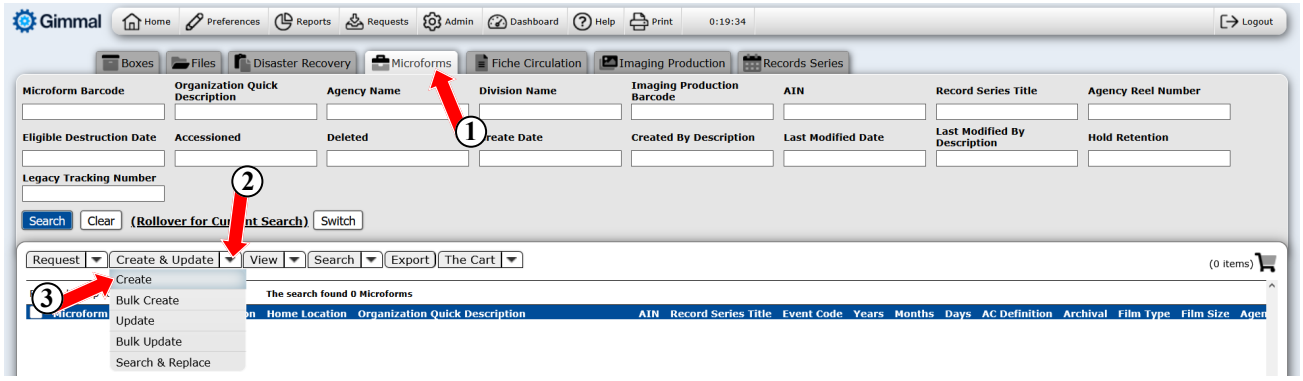
Bundle Microfiche Jackets

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.***

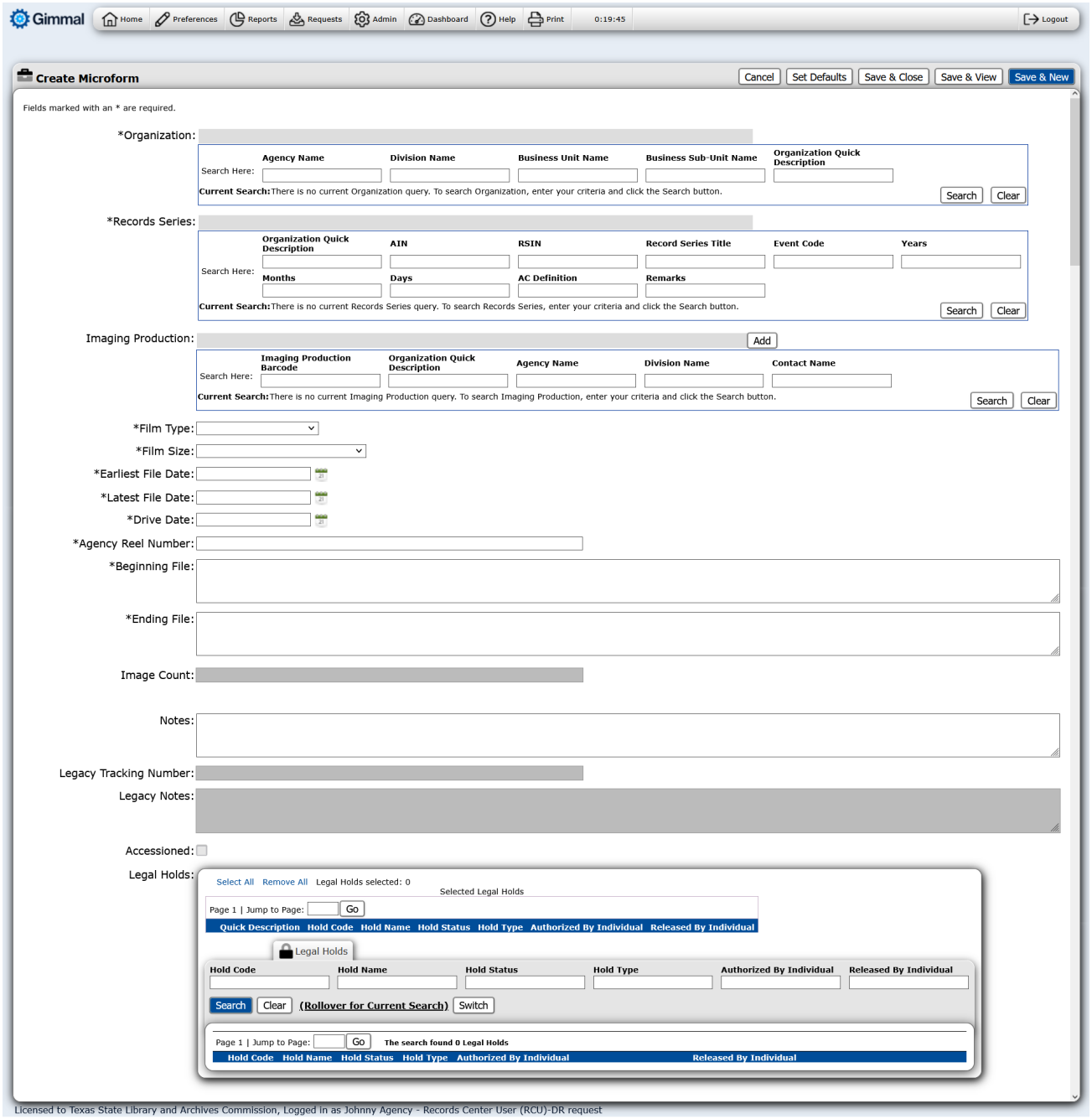
Create microfiche bundles



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.

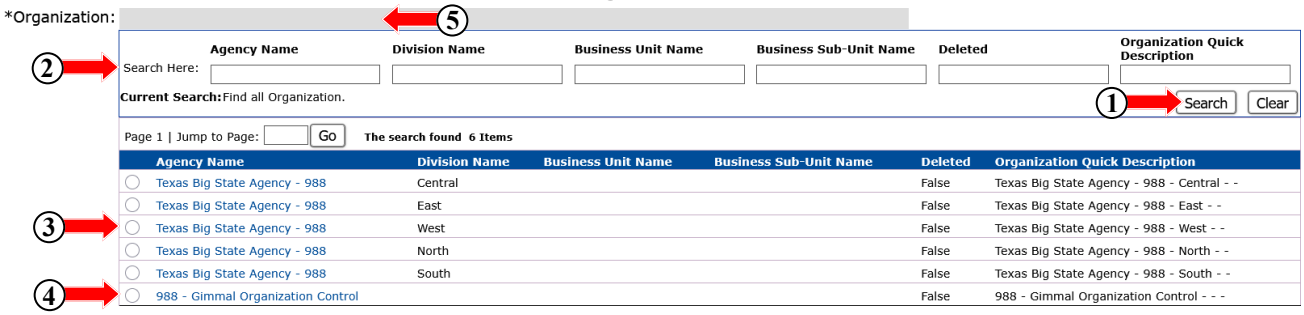
Microfiche: Use ‘Create’ to Add Bundles

Create Microform screen



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

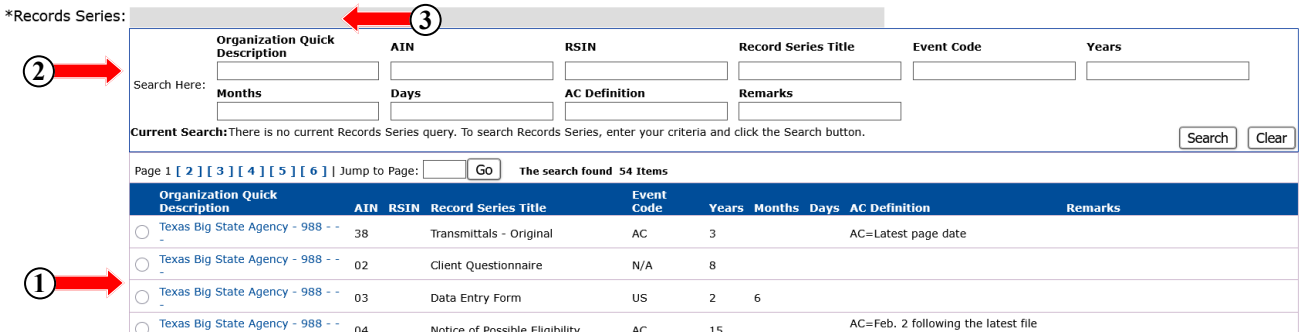
*Organization



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.*

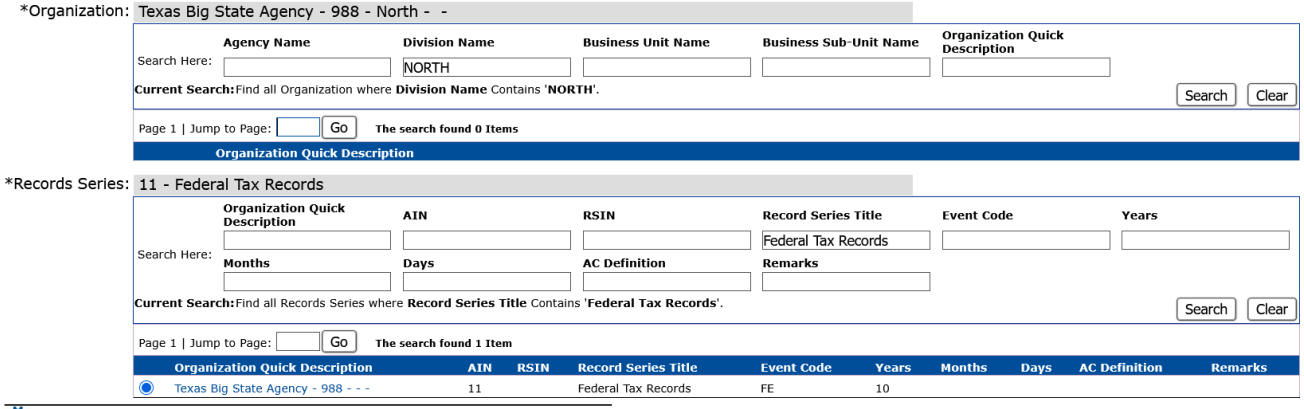
*Records Series



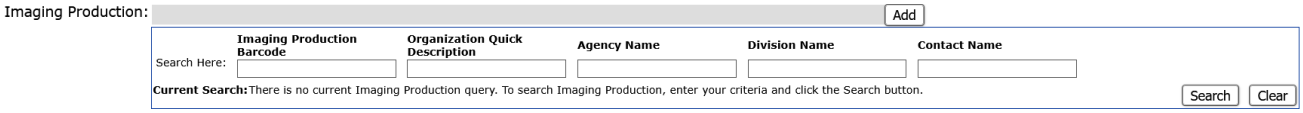
Records Series is a combination of Agency Item Number (AIN) and Record Series Title on the agency's Records Retention Schedule. The item created in Gimmal must have a Records Series assigned to it. Select the Record Series Title by clicking once **(1)** on the radio button at the left side of the screen. 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:

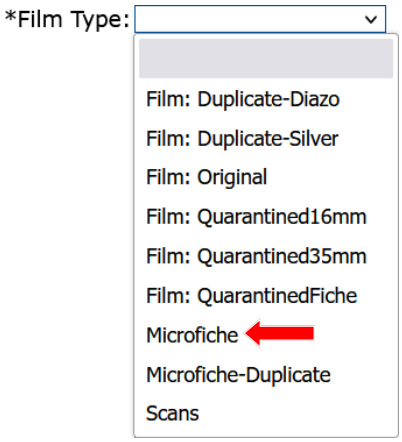


Imaging Production



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

*Film Type

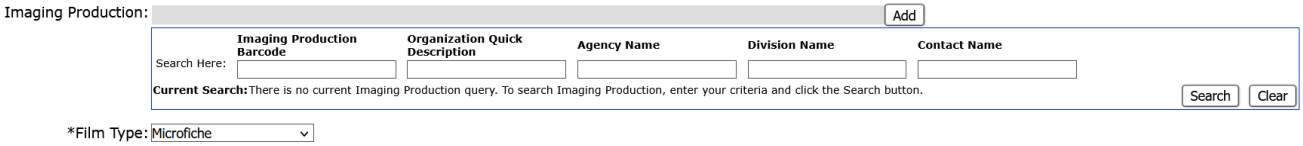


Film Type: The only option for microfiche storage at the SRC is:

- **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:



*Film Size

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

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

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:

*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 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: 08/31/2025

*Agency Reel Number: M9114

*Beginning File: ID# XXXXXX825

*Ending File: ID# XXXXXX037

*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 storge.
Data Example: 170

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.

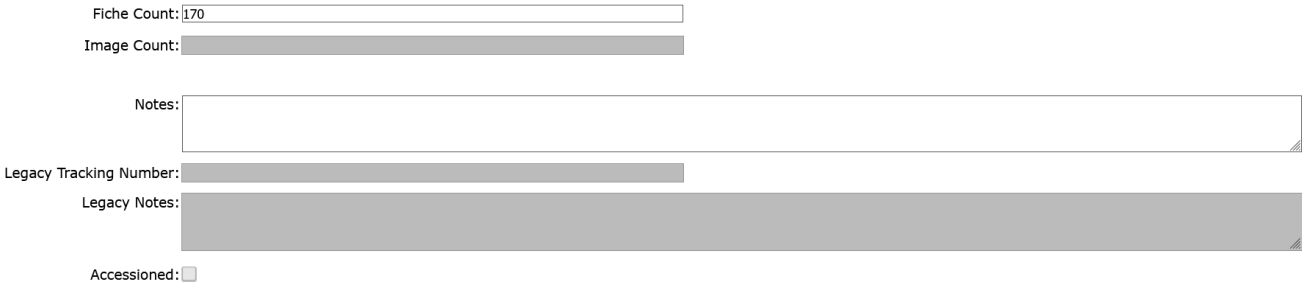
Notes

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

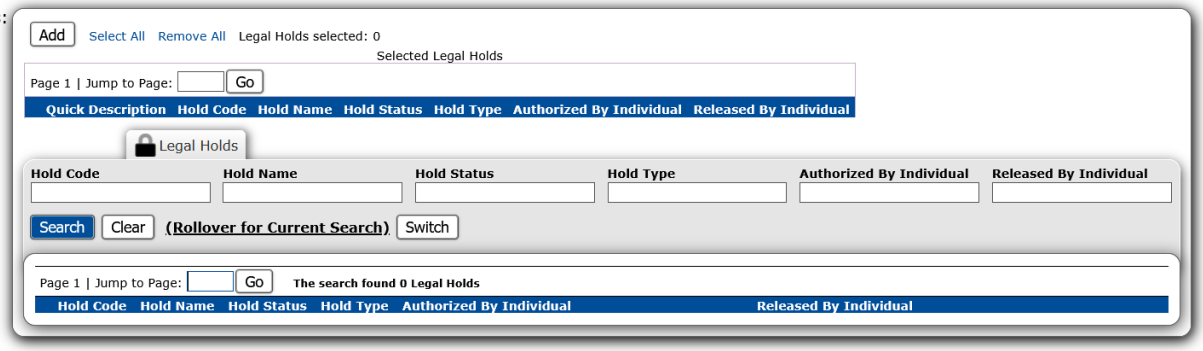
How these fields look when completed:



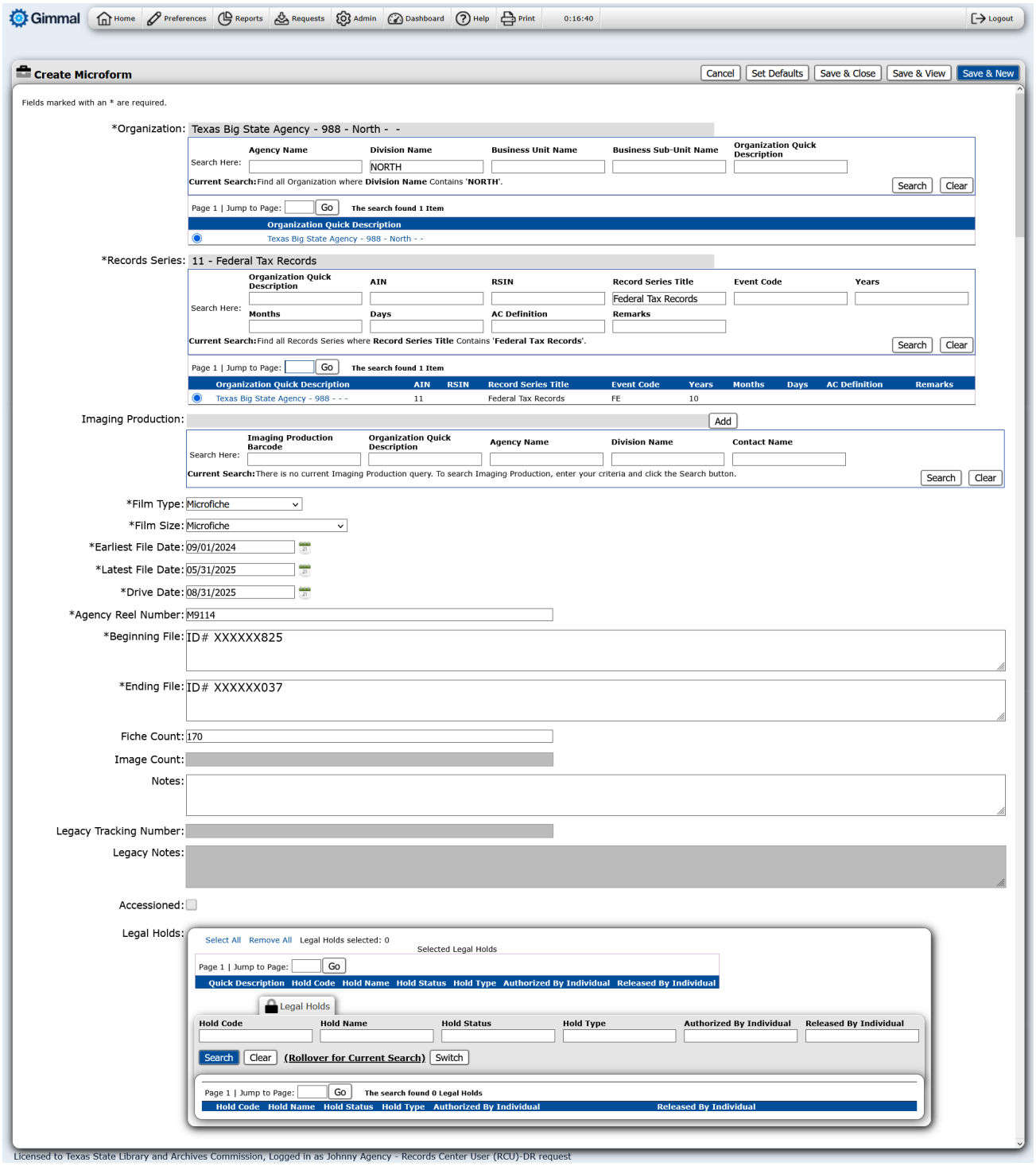
Legal Holds

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.*

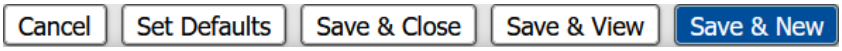
Legal Holds:



Completed: Create Microform screen:



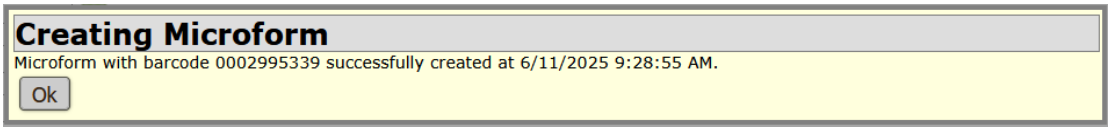
Save Options



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.

NOTES

NOTES

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)

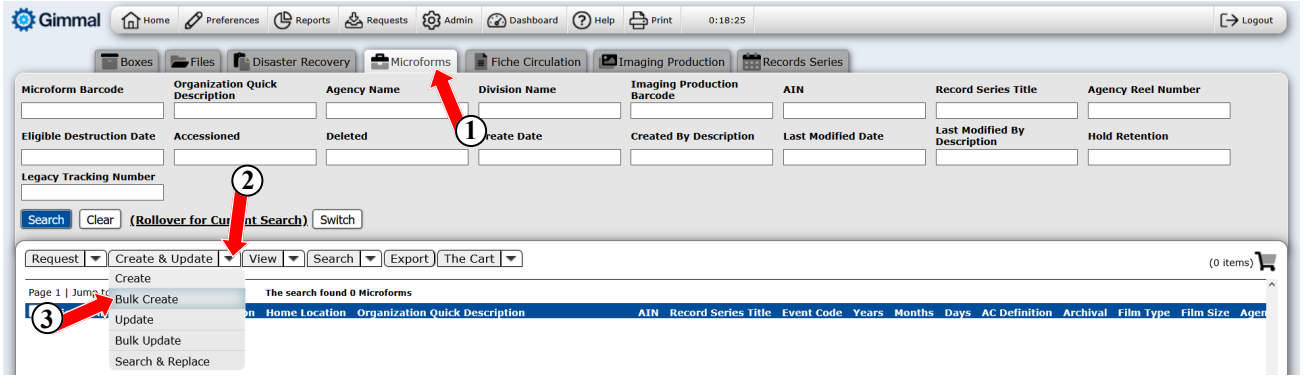
Bundle Microfiche Jackets

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.

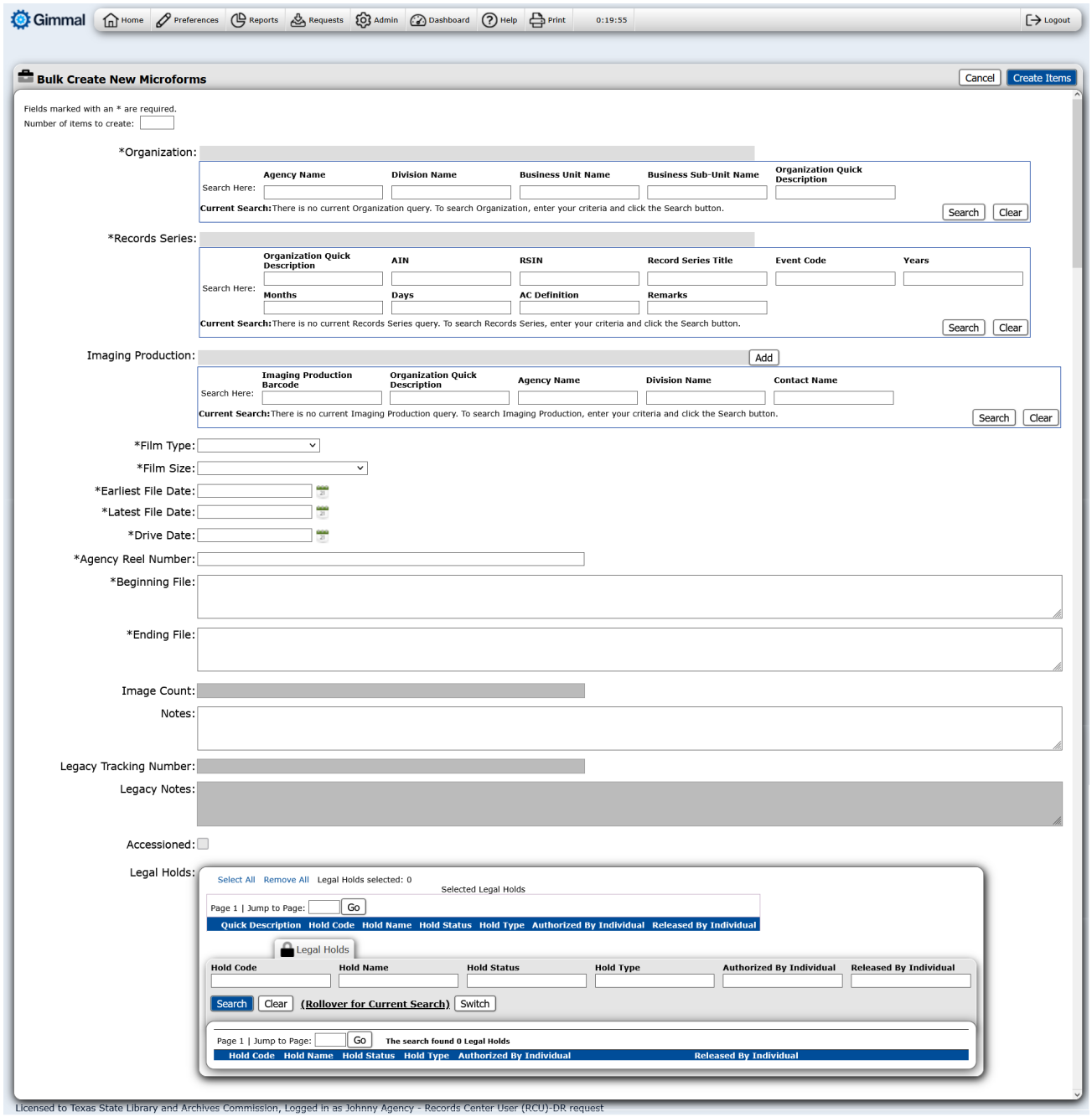
BOXYBIT *It is recommended that the microfiche jackets be in protective microfiche envelopes, grouped by the title on the jackets. Envelopes look like small paper folders sealed on three sides and open at the top long edge. Please place a small piece of paper or index card at the start and end of each 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



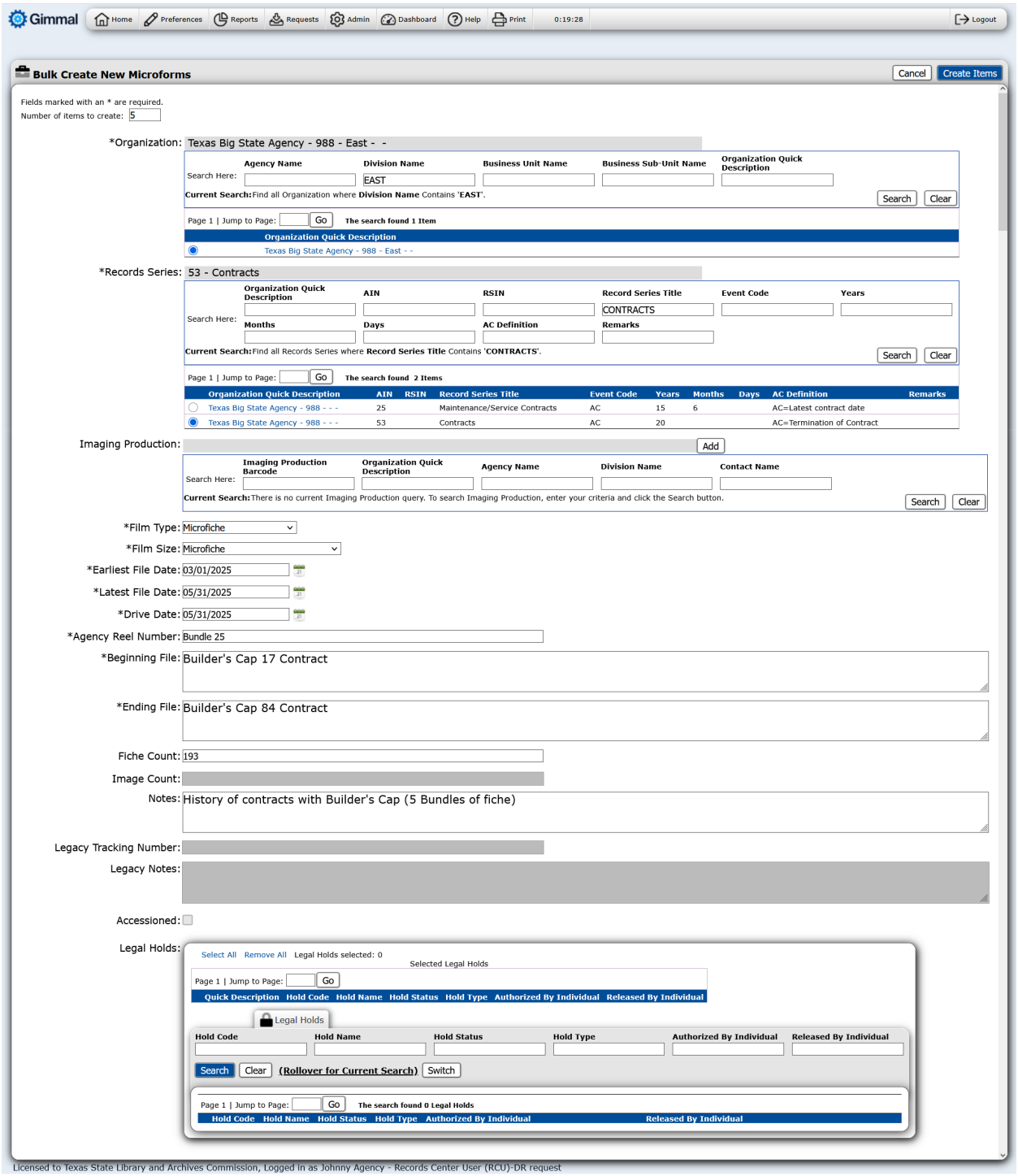
Number of items to create

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:

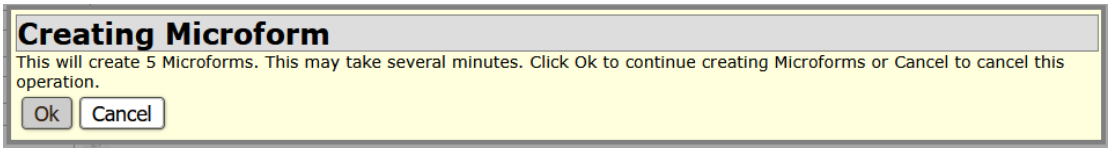


Save

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:

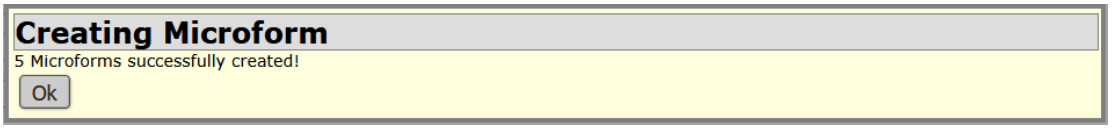
- **Cancel**: Click once to cancel the create process for these items. They will not be saved.
- **Create Items**: Click once to create the microfiche bundles.

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.*



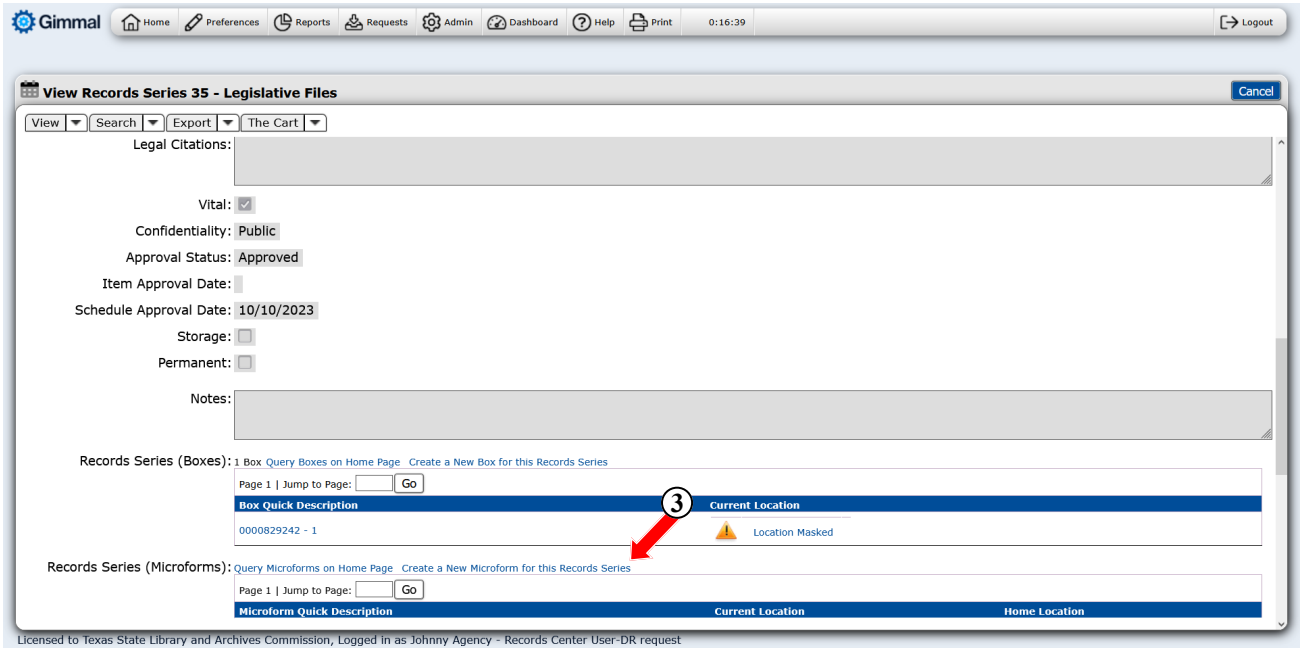
When the above message appears, click once on **Ok**. Then, turn to ***Request Pickup: Send/Return Items to the SRC*** (Page 93) to have the microfiche bundles picked up by the SRC.

NOTES

NOTES

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

View Records Series



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

NOTES

Request Pickup:
Send/Return Items to the SRC

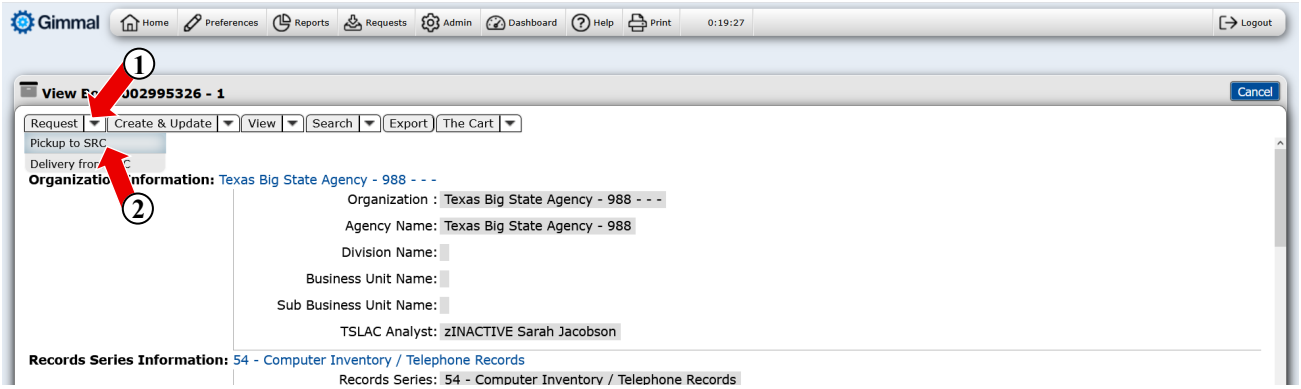
BOXYBIT ***Gimmal clients outside of Austin:*** *Check with the agency's Records Management team to determine if Gimmal is used to Request Pickup since additional charges may apply.*

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 storge, 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



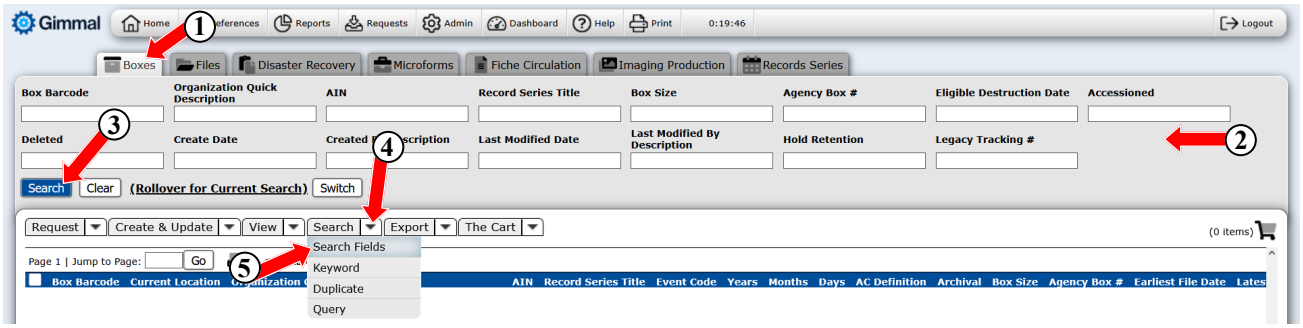
After an item is created using **Save & View** and **Ok** has been clicked in the barcode dialogue box, **View Box** (or Disaster Recovery, or Microform) is the next screen. This is where information can be reviewed for the item that has been created in Gimmal.

To begin the Request Pickup process:

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

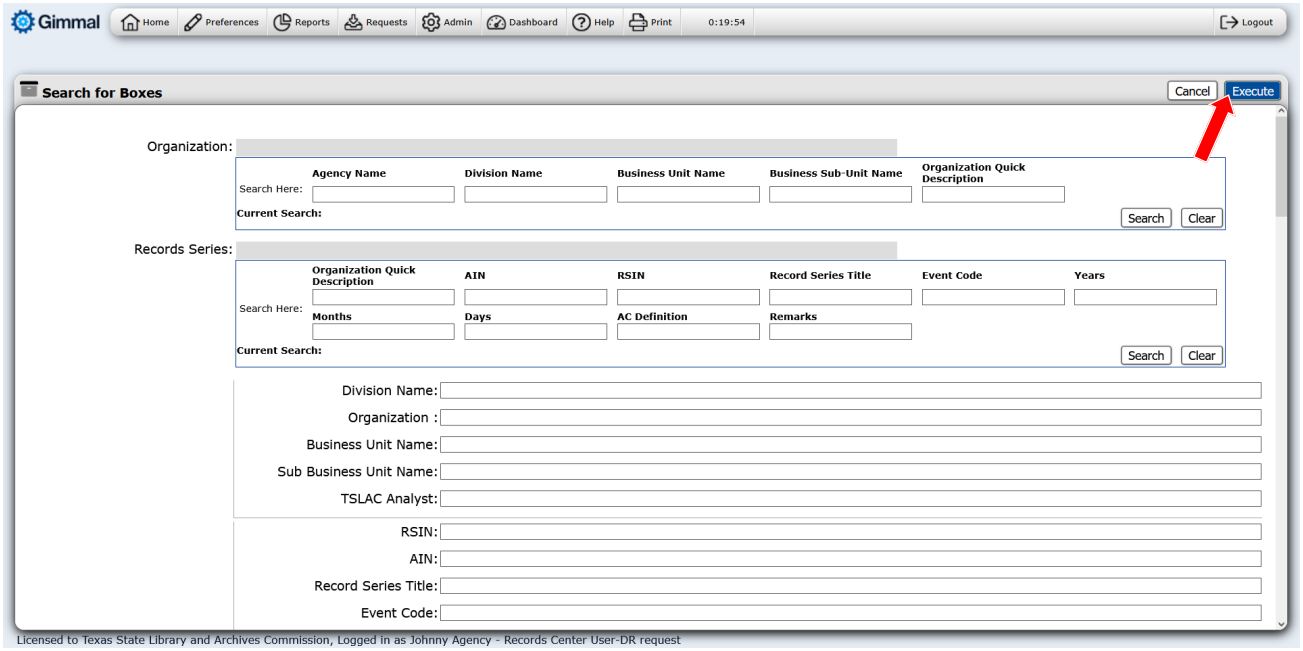
Turn to **Request Pickup screen** (Page 96).

Use Search



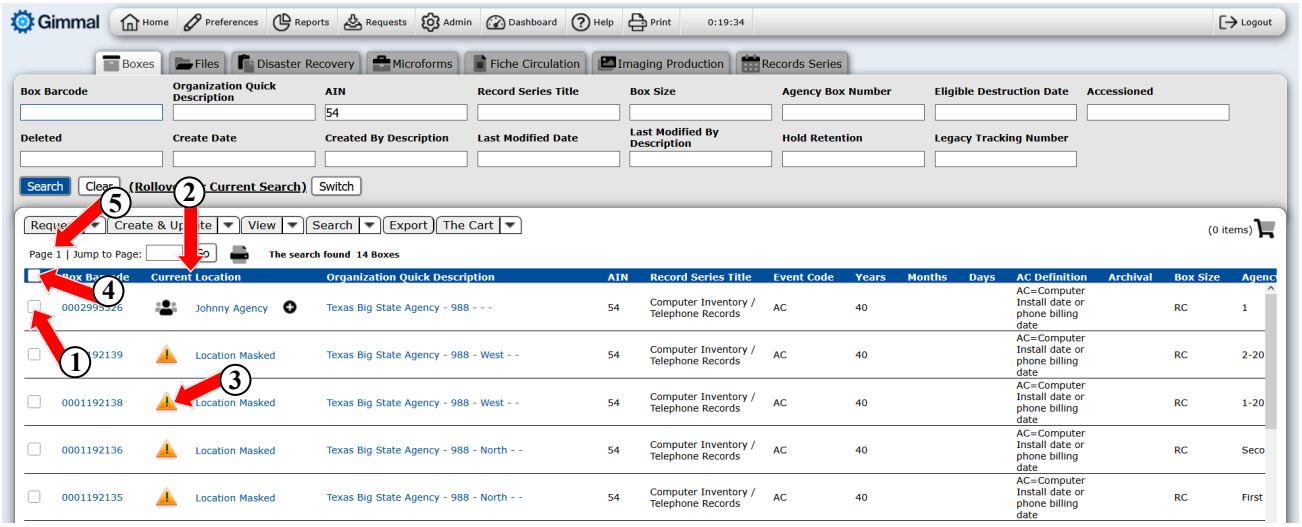
1. Click once on the item type tab to **Search** (in this example, the Boxes tab).
2. Enter search terms into any **Quick Search** field(s) to find the item or items.
3. Click once on **Search** (continue on Page 95, **Search results**, if information shows in the home page grid).
   OR
4. Click once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

Search Boxes (or whatever tab selected)



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**.

Search results

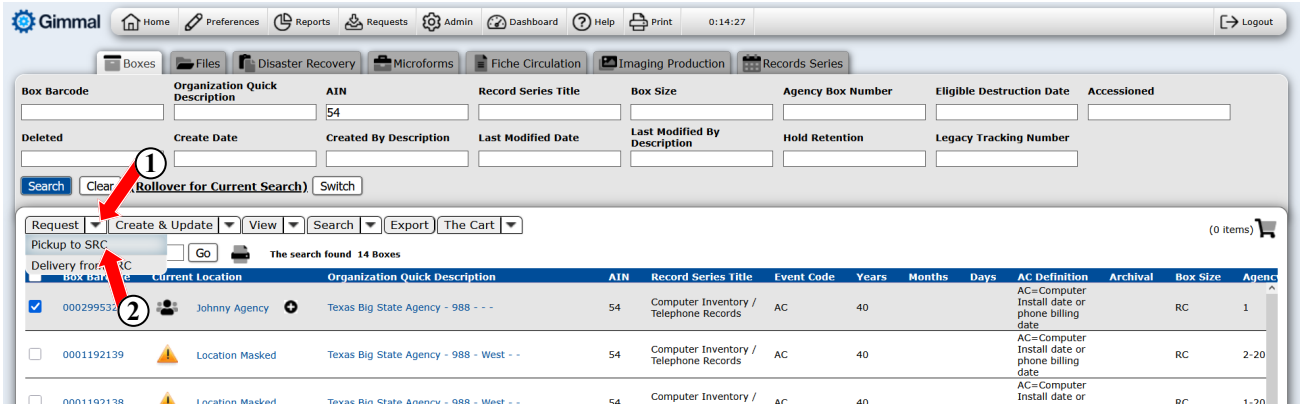


Regardless of the Search method used from Page 94, the above screen is the next destination.

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).*

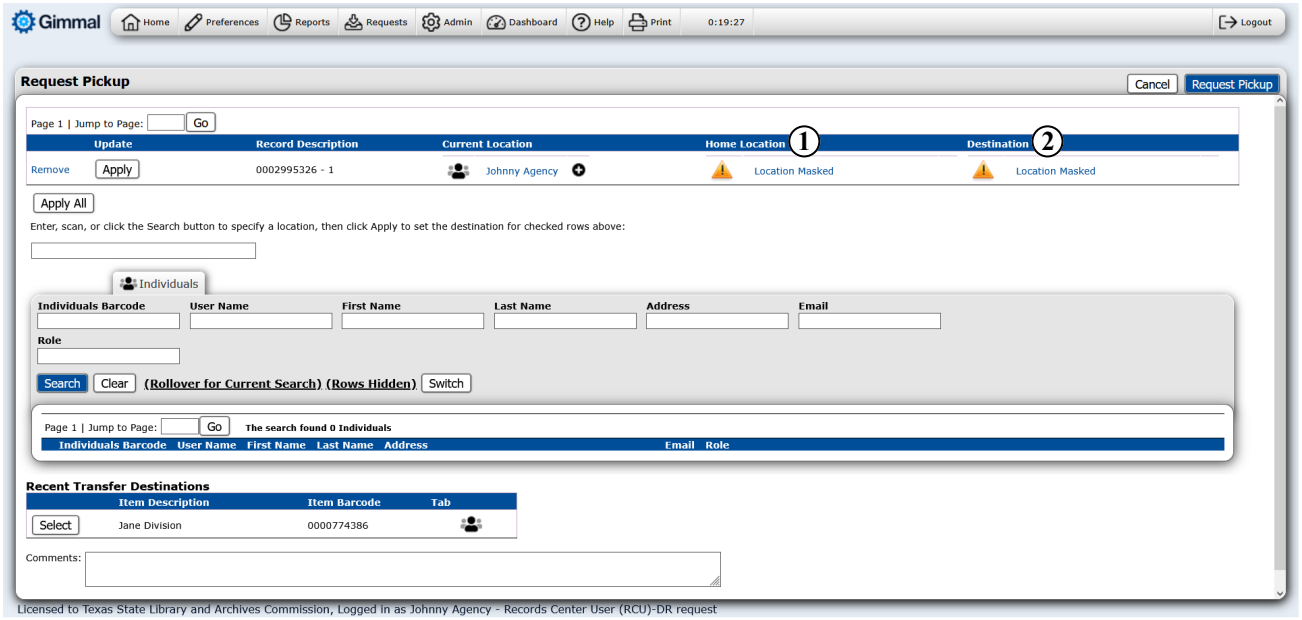
Select Pickup to SRC



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**.

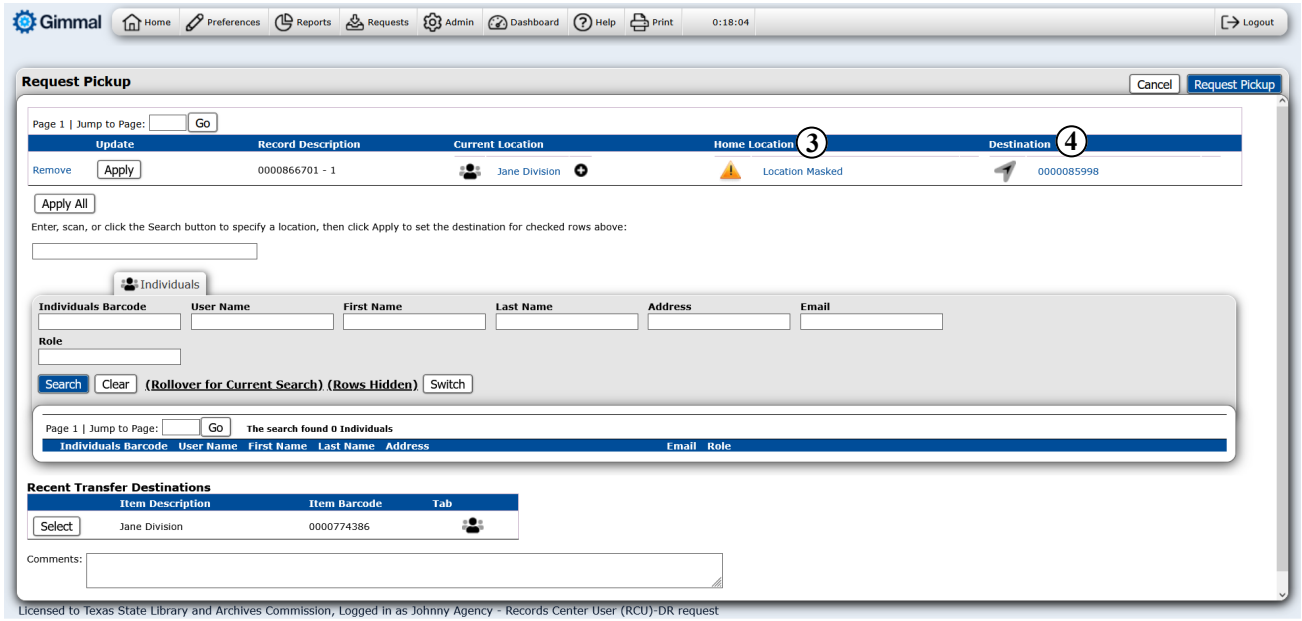
Request Pickup screen



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

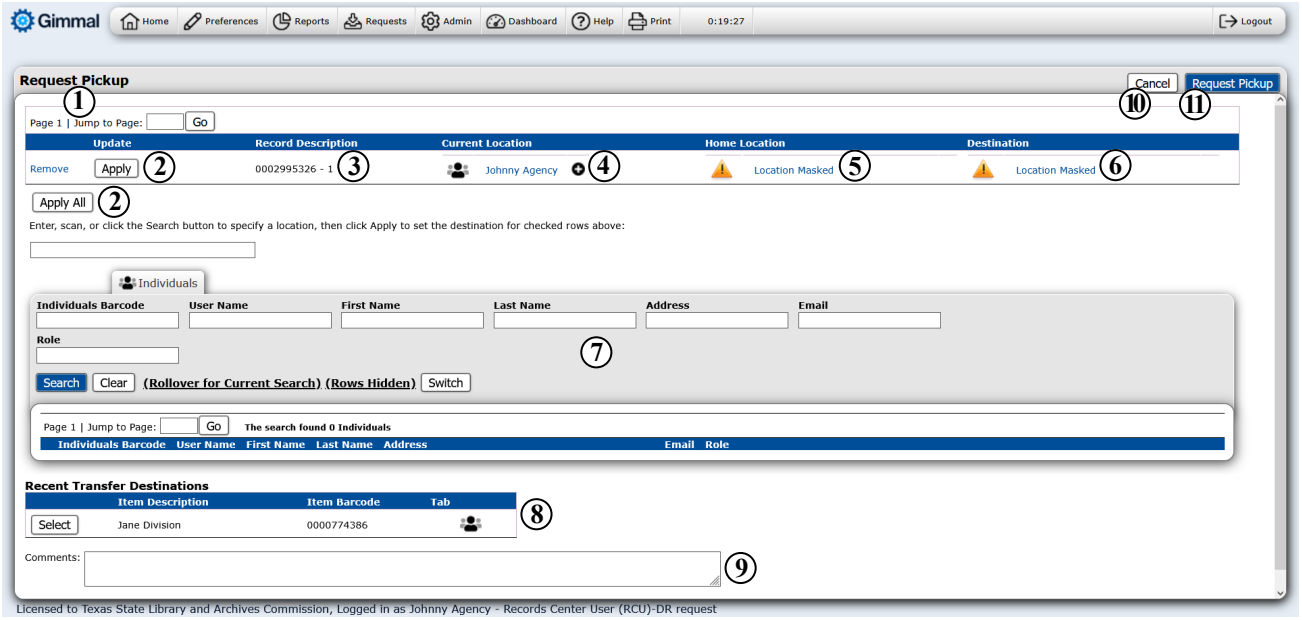
Send items to the SRC for the first time (above image):
The screen looks similar to the above illustration for items being sent to the SRC for the first time. Location Masked shows in the **Home Location** column **(1)** and **Destination** column **(2)**. There is no State Records Center barcode label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



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.*

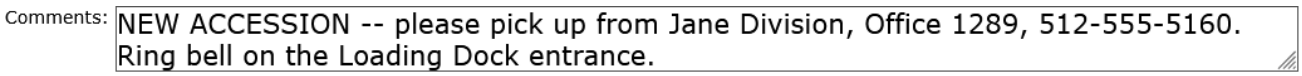
Sections on Request Pickup screen



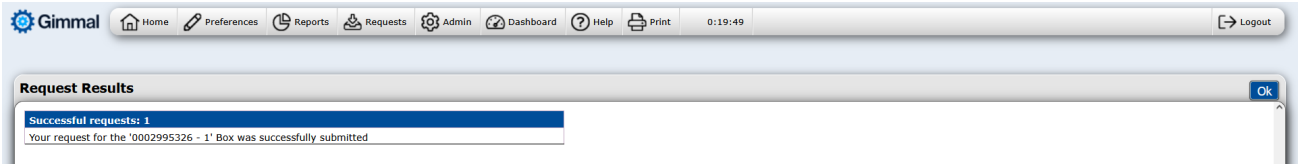
1. **Page Information:** This displays the number of screen pages for the pickup item(s). The maximum is 10 items per page. All items on all pages will be processed with this request.
2. **Change Destination:** APPLY buttons are not used. **Disregard these buttons.**
3. **Record Description:** The item barcode and the container number.
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 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.
   Item(s) to be returned to the SRC: Location Masked is shown to hide secure information.
6. **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).
   New storage item(s): Location Masked is shown to hide secure information.
   Item(s) to be returned to the SRC: 0000085998 is shown to hide secure information.
7. **Individuals tab:** This function is not used for pickup items. **Disregard the Individuals tab.**
8. **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.**
9. **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/slrm/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.
10. **Cancel button:** Click once to cancel this request and return to the home page.
11. **Request button:** Click once on **Request Pickup** when this screen is complete.

Modify the pickup location and other uses for 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:



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.

NOTES

NOTES

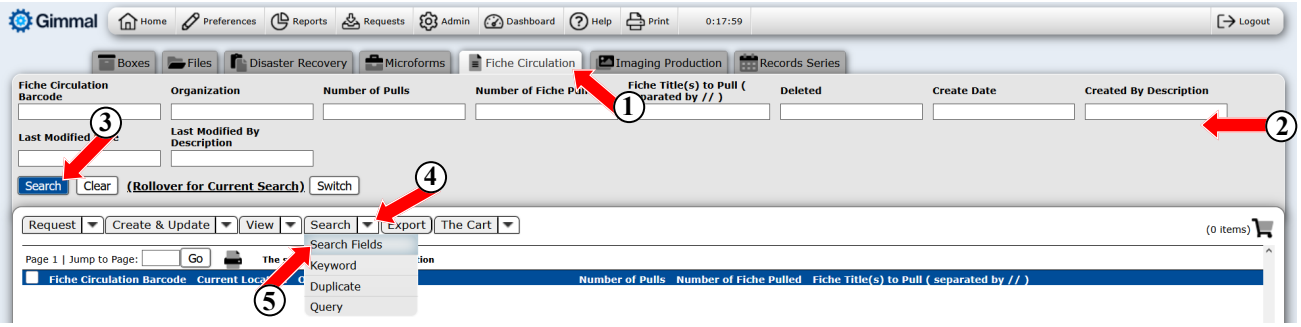
Request Pickup: Fiche Circulation: Return Microfiche Jackets to the SRC

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.

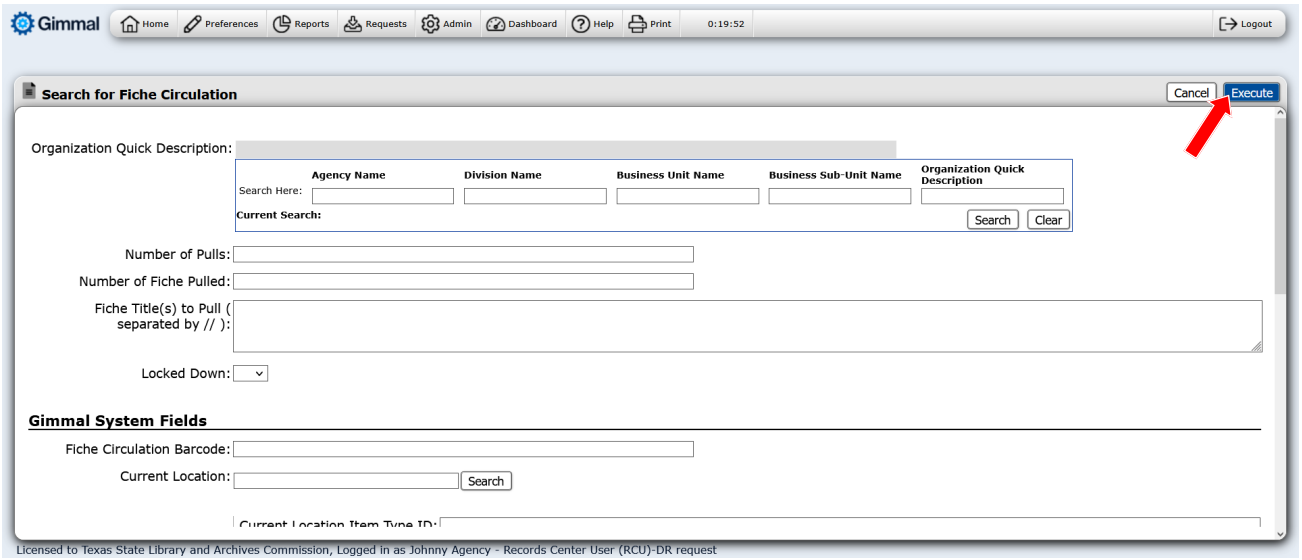
BOXYBIT *This section is used only for Microfiche jackets that were delivered as part of a bundle stored at the SRC. For microfiche jacket returns to the SRC that were delivered as a complete bundle, please see the section* **Request Pickup: Send/Return Items to the SRC** *(Page 93).*

Use Search



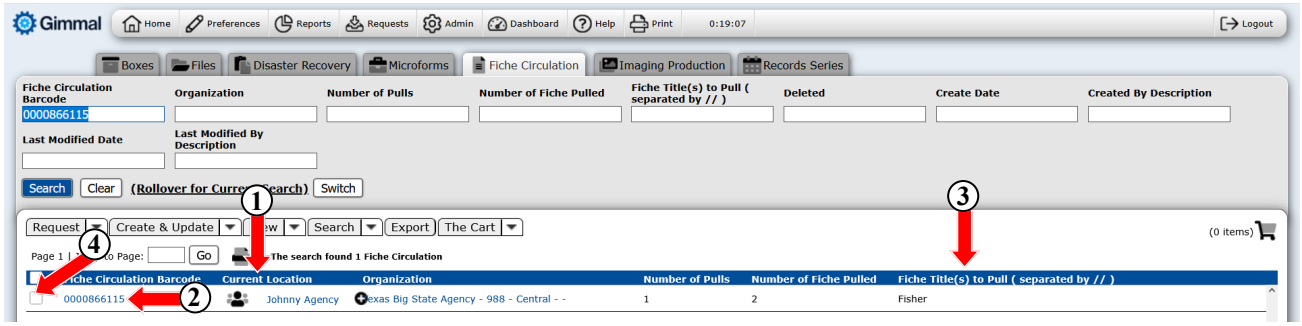
1. Click once on the **Fiche Circulation** item type tab.
2. Enter search terms into any of the **Quick Search** fields to find the Fiche Circulation that was created to deliver the fiche item(s).
   BOXYBIT ***The Fiche Circulation Barcode*** *is found on the delivery envelope for the microfiche item(s) 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**).

Search Fiche Circulation



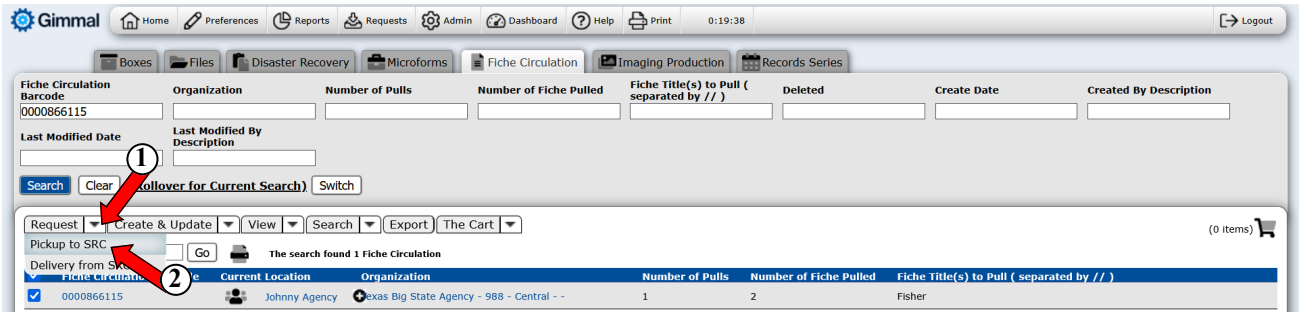
Enter search information into any fields (including the **Gimmal System Fields** at the bottom half of the screen) to find the microfiche jackets that were delivered. Click once on **Execute**.

Search results



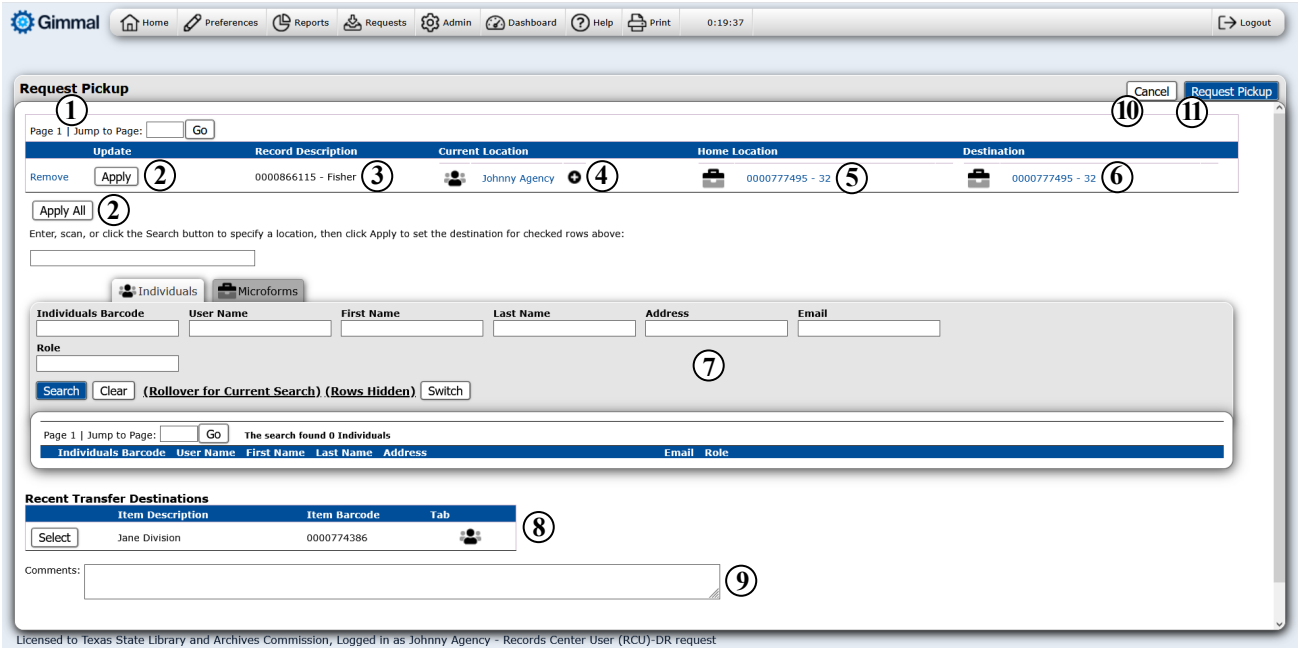
Regardless of the Search method used from Page 101, the above illustration is the next screen. The search result for Fiche Circulation item(s) populate the home page grid. The **Current Location** column **(1)** shows the individual at the agency assigned to the item(s). In this example **Fiche Circulation 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



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

Sections on Request Pickup screen



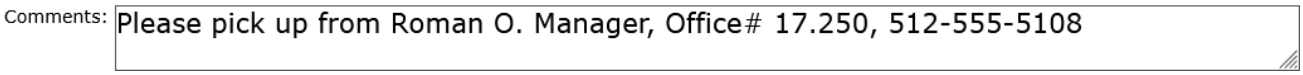
1. **Page Information:** This displays how many screen pages the requested pickup items appear. The maximum is 10 items per page. All items on all pages will be processed with this request.
2. **Change Destination:** APPLY buttons are not used. **Disregard these buttons.**
3. **Record Description:** The item barcode and the container number.
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 barcode for the microfiche bundle 0000777495 - 32 at the SRC where the fiche pulled is shown as the Home Location.
6. **Destination:** The barcode for the microfiche bundle 0000777495 - 32 at the SRC where the fiche pulled is shown as the Destination.
7. **Individuals/Microforms tabs:** This function is not used for pickup items. **Disregard the Individuals/Microforms tabs.**
8. **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**.
9. **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/slrm/storage**

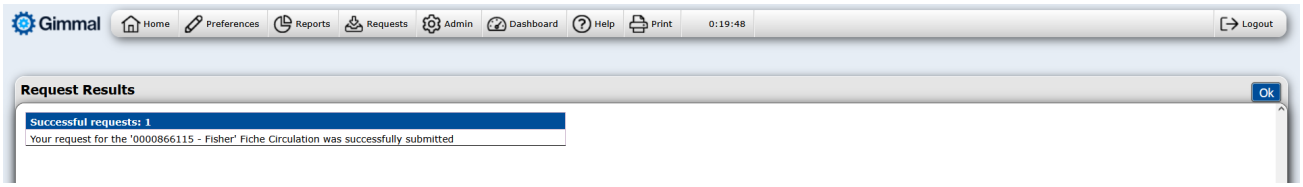
   To take item(s) to the SRC: If the item(s) will be taken to the SRC by an agency employee instead of having the SRC driver make the pickup, include a note about this in the Comments field and call the SRC Circulation Desk 512-475-5155 to make the arrangement.
10. **Cancel button:** Click once to cancel this request and return to the home page.
11. **Request Pickup button:** Click once on **Request Pickup** when this screen is complete.

Modify the pickup location and other uses for 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:



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.

NOTES

SRC = State Records Center

NOTES

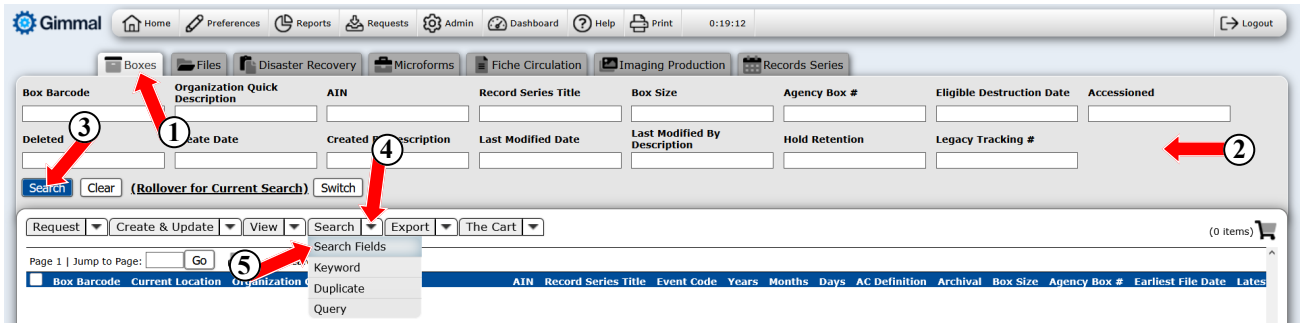
Request Delivery from the SRC:
Boxes, Disaster Recovery, Microfilm Reels, and Microfiche Bundles

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.*

Request delivery for boxes, disaster recovery (please see **Disaster Recovery Vault After-Hours Access**, Page 51), microfilm reels, or complete microfiche bundles is completed the same way for each item type tab. File delivery request process is explained in the section ***Request Delivery from the SRC: Files*** (Page 115). There is also a slightly different process to request delivery of microfiche jackets that are part of a microfiche bundle explained in the section ***Request Delivery from the SRC: Fiche Circulation: Microfiche Jackets*** (Page 131). To use Scan On Demand to request delivery to a work email address for files, specific microfilm images, or microfiche jackets from a bundle of microfiche, that request process is explained in ***Supplemental Information: Scan On Demand for Delivery*** (Page 193).

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

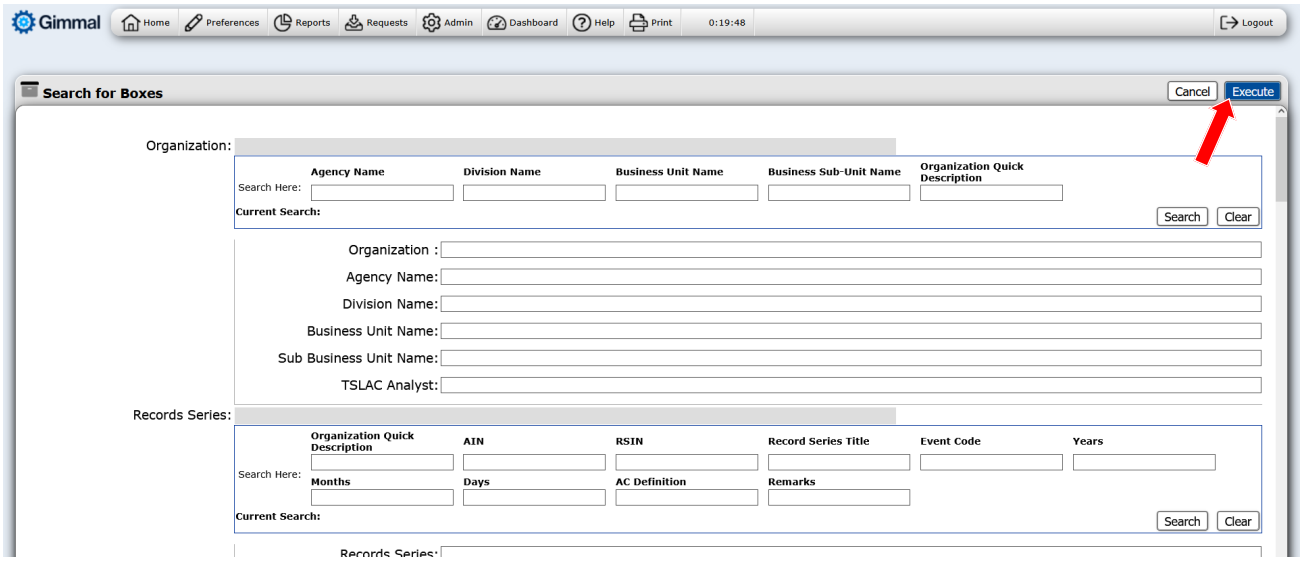
Find the item(s) to request delivery



To find the item(s) to be delivered from the SRC, there are two preferred ways to perform a search:

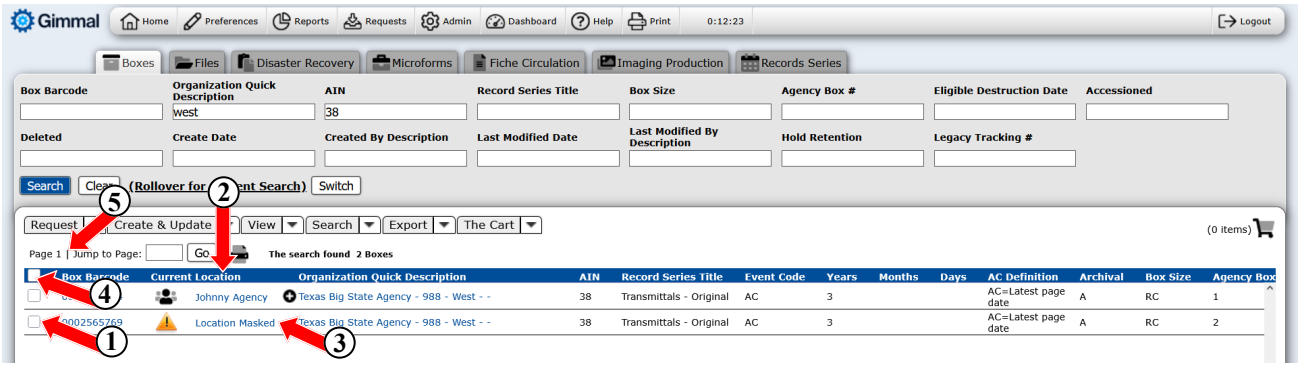
1. Click once on the appropriate **item type tab** to search.
2. Enter search terms into any of the **Quick Search** fields to find the item at the SRC.
3. Click once on **Search**. If results populate in the grid, continue to **Search Results** (Page 108).
   OR
4. Click once on **Search**.
5. Click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

Search Boxes (or whatever tab selected)



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

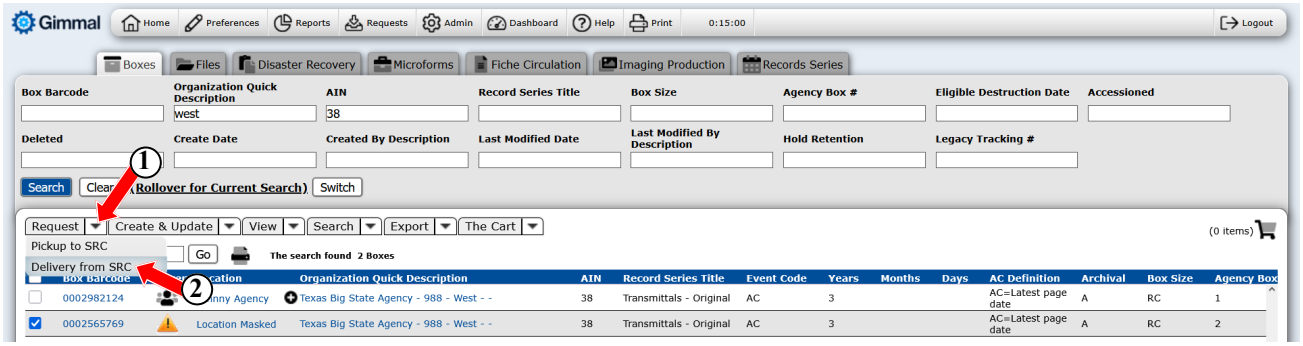


Regardless of the Search method used from Page 107, the above screen is the next destination.

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).*

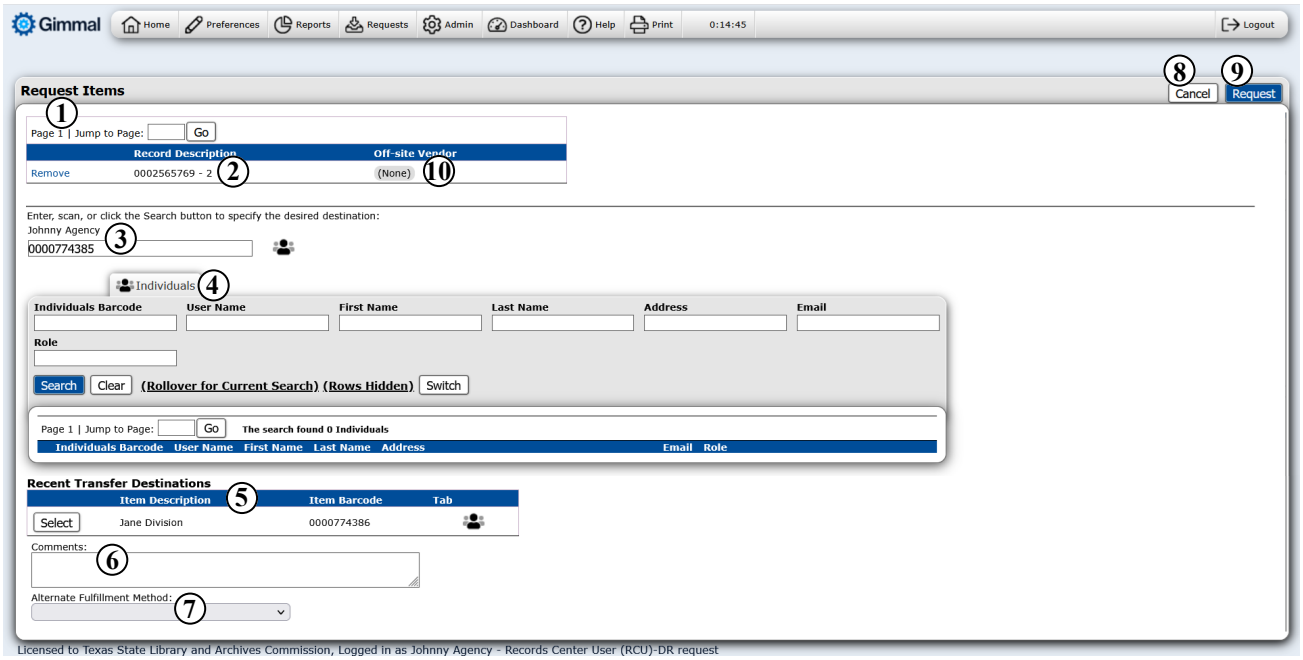
Select Delivery from SRC



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**.

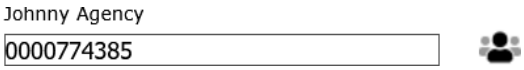
Sections on Request Items screen



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

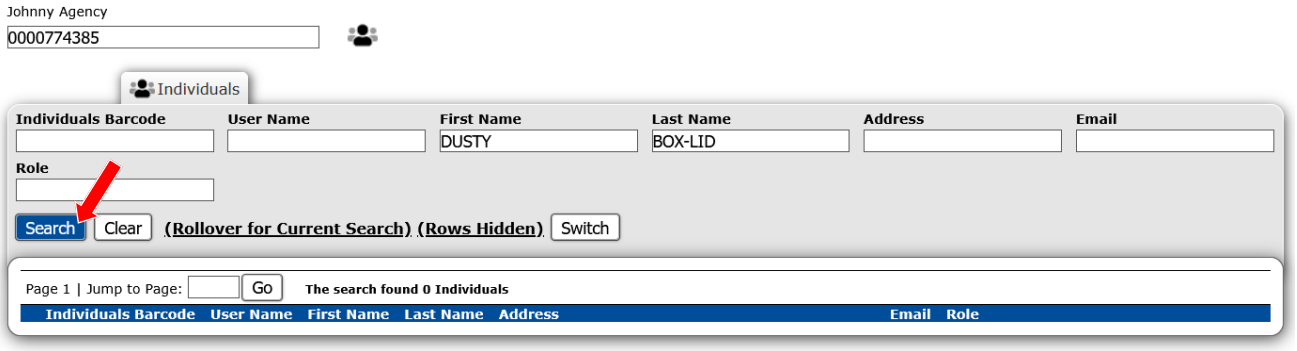


Sometimes, a coworker other than the person named here is to be the delivery destination. In the above illustration, Johnny Agency is the **delivery destination**. To change the delivery destination for the box, use the **Recent Transfer Destinations** section if the person is listed.

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

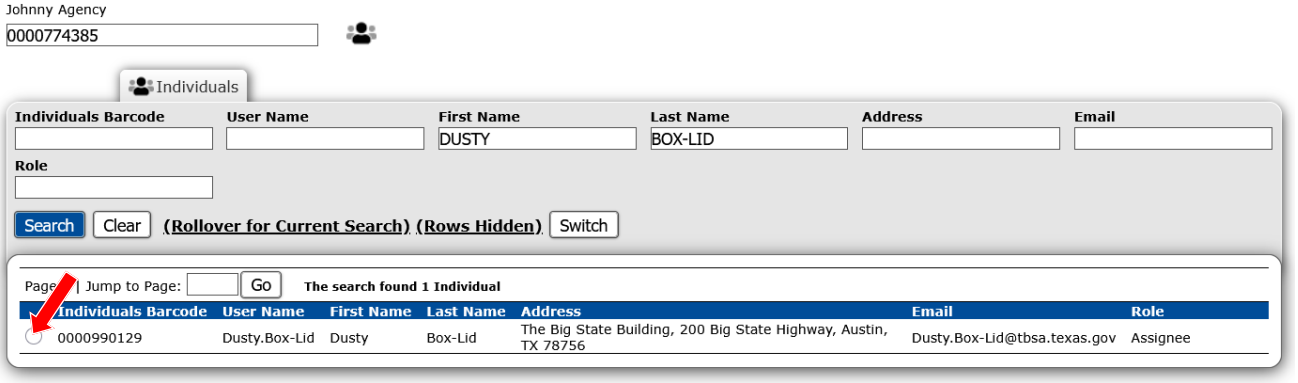
*Click once on **Select** and continue to Page 111.*

Individuals tab



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**.

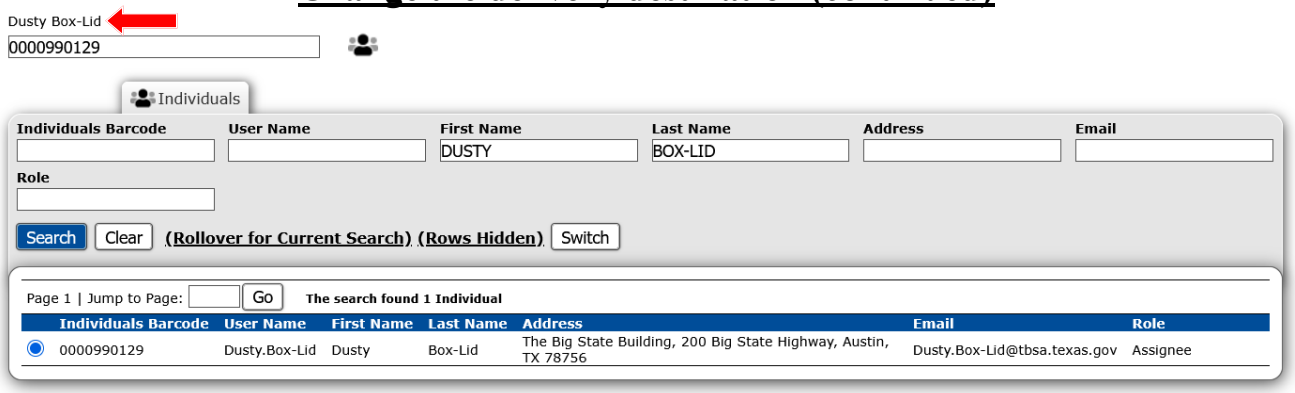
Data Example: Dusty (in First Name) Box-Lid (in Last Name)



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.

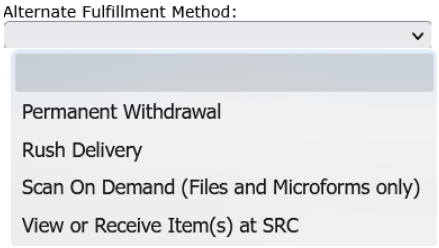
BOXYBIT *If the person who is to be the delivery destination cannot be found in Gimmal, contact the agency's Records Management team to get that person added to Gimmal.*

Change the delivery destination (continued)



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

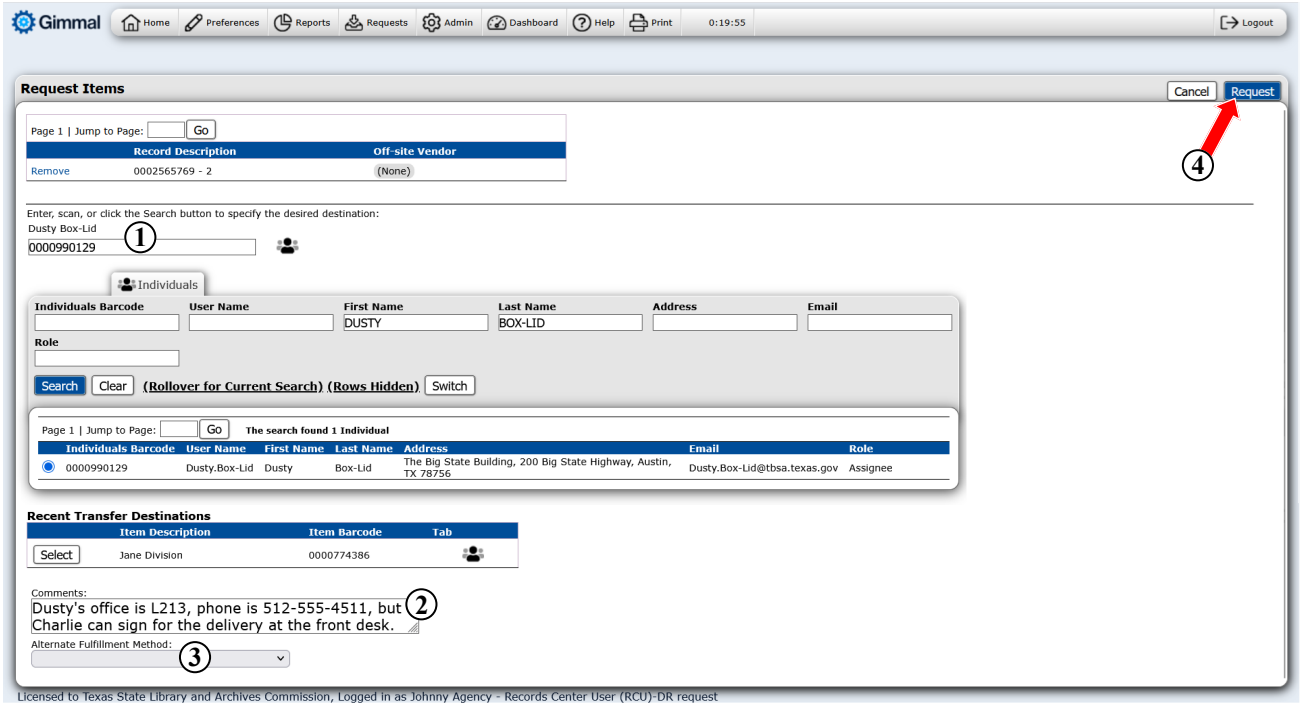


There are several options here (leave this field empty if this is a standard delivery):

- **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/slrm/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.*

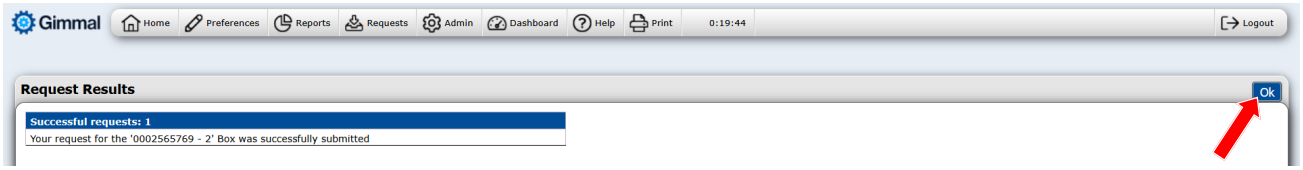
For more information about Alternate Fulfillment Method, please see ***Supplemental Information: Alternate Fulfillment Method*** (Page 177).

Review Request Items



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



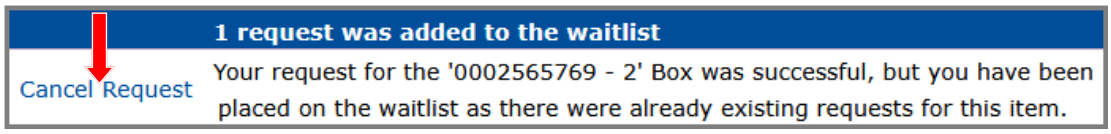
The Request Delivery was successfully submitted. The person assigned as the delivery destination will receive these items usually within one Monday-Friday workday for a regular (non-Rush) delivery of one to a few items. Larger deliveries may take several days. Please call the SRC Circulation Desk (512-475-5155)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

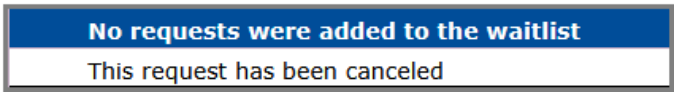


Waitlist means that someone else has already requested the item for delivery or it is assigned to someone else at the agency (not at its home location).

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:



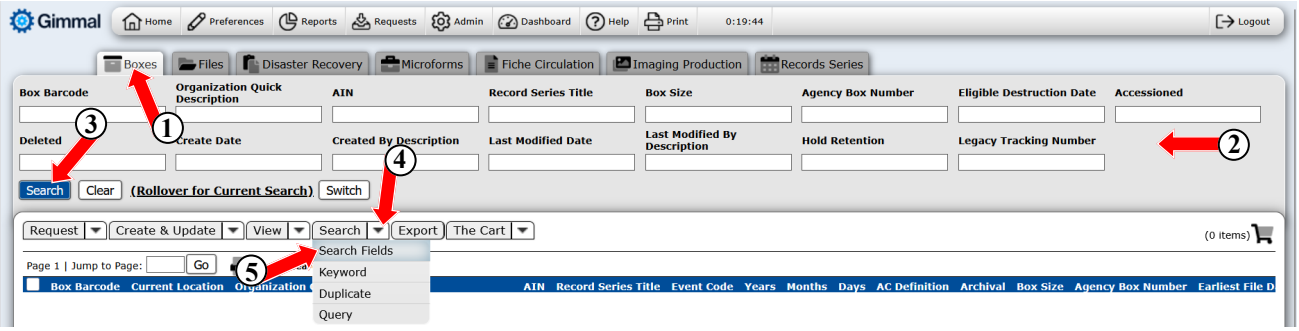
NOTES

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.

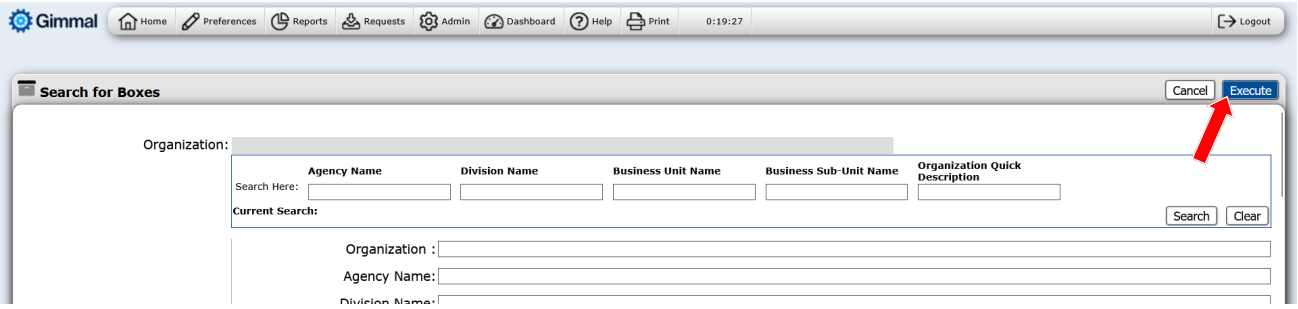
Find the box to request file delivery



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

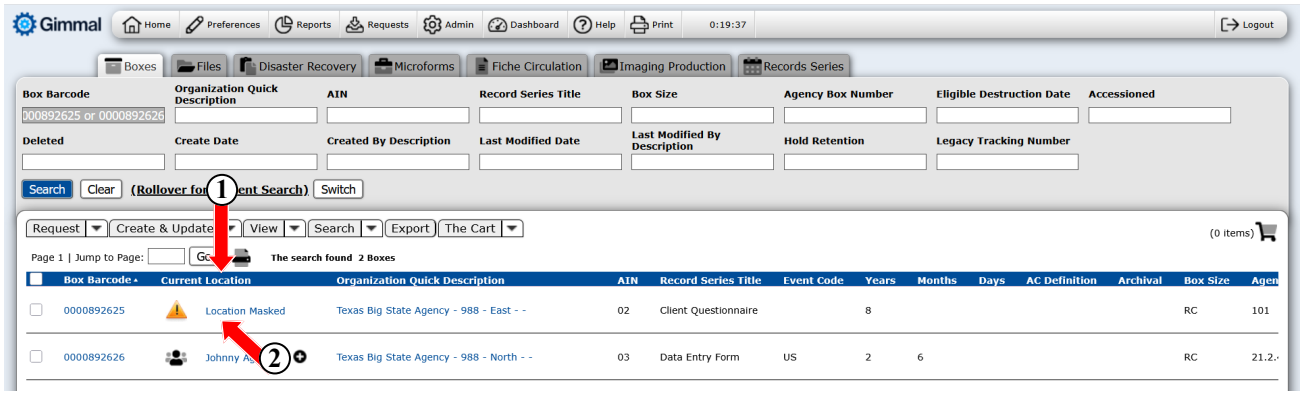
1. Click once on the **Boxes** item type tab.
2. Enter search terms into any of the **Quick Search** fields to find the box at the SRC.
3. Click once on **Search**. If results populate in the grid, continue to **Search results** (Page 116).
   OR
4. Click once on **Search.**
5. Click once on **Search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

Search Boxes



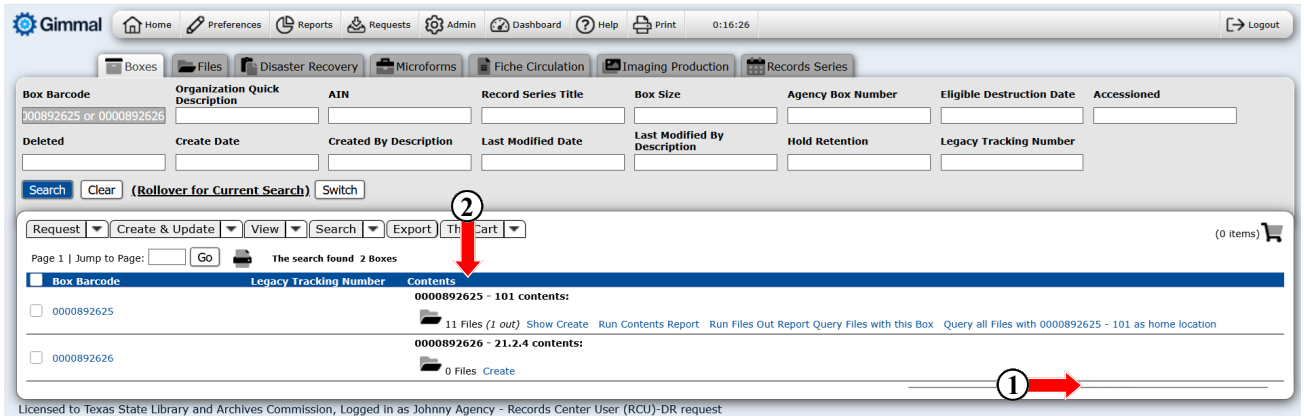
Enter search information into any fields (including the **Gimmal System Fields** at the bottom half of the screen) to find item(s) to request delivery. Click once on **Execute**.

Search results



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



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:

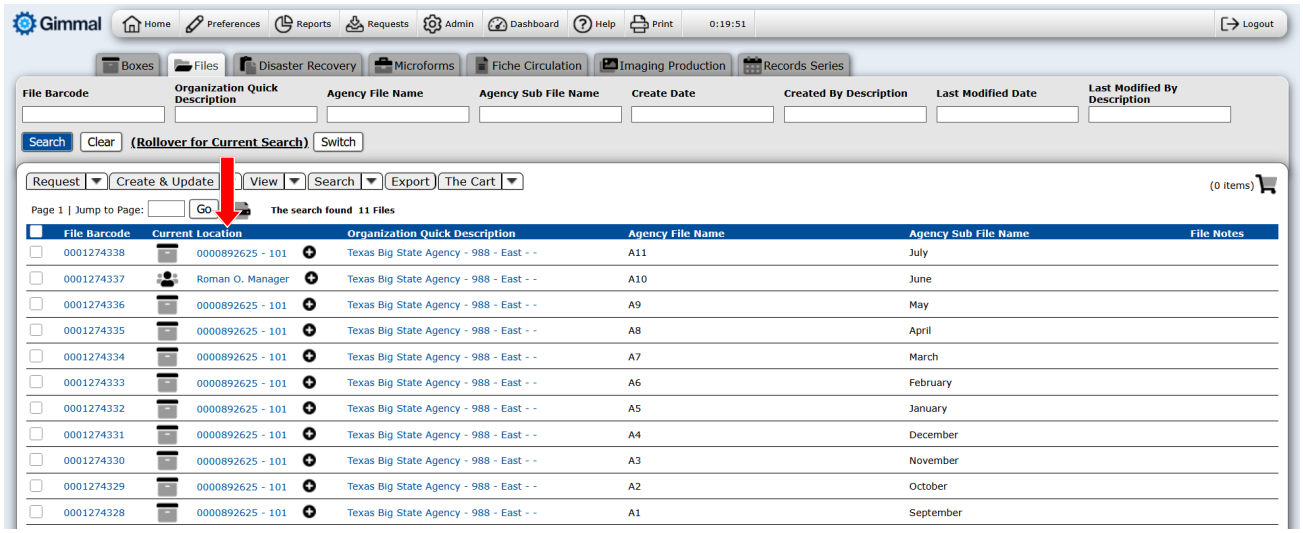
0 Files Create

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).

See if the file exists in Gimmal

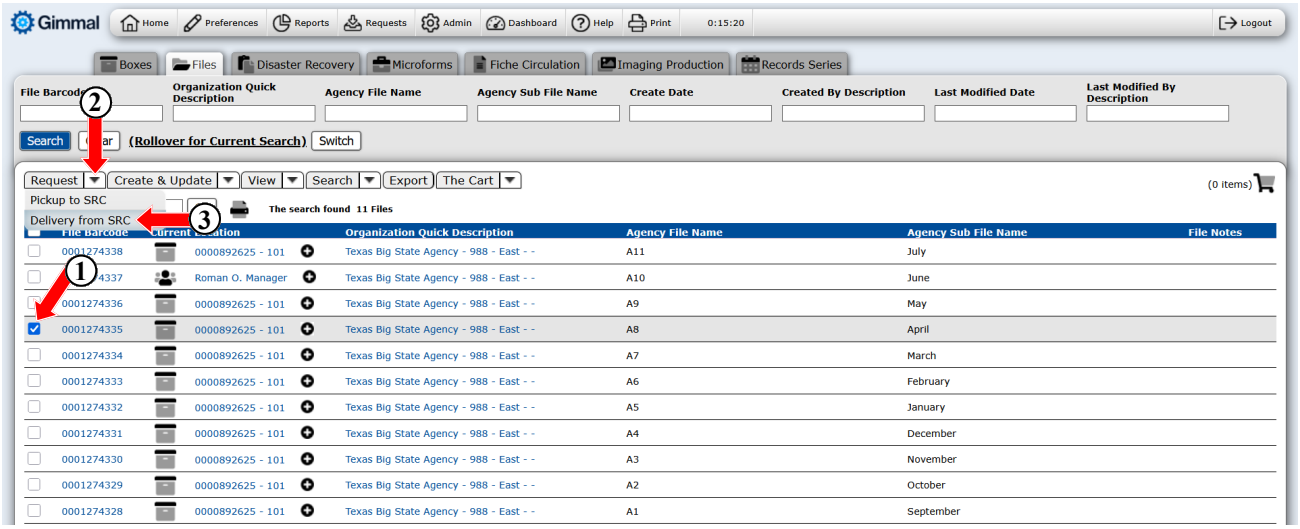
Click once on the link text for **Query all Files with (box barcode number - box number) as home location** to go to the Files Home Page Grid. Choose this option instead of Query Files with this Box because this option shows all files assigned to the box, even those checked out of the box and delivered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

Files Home Page Grid



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

Files Home Page Grid: Request Delivery

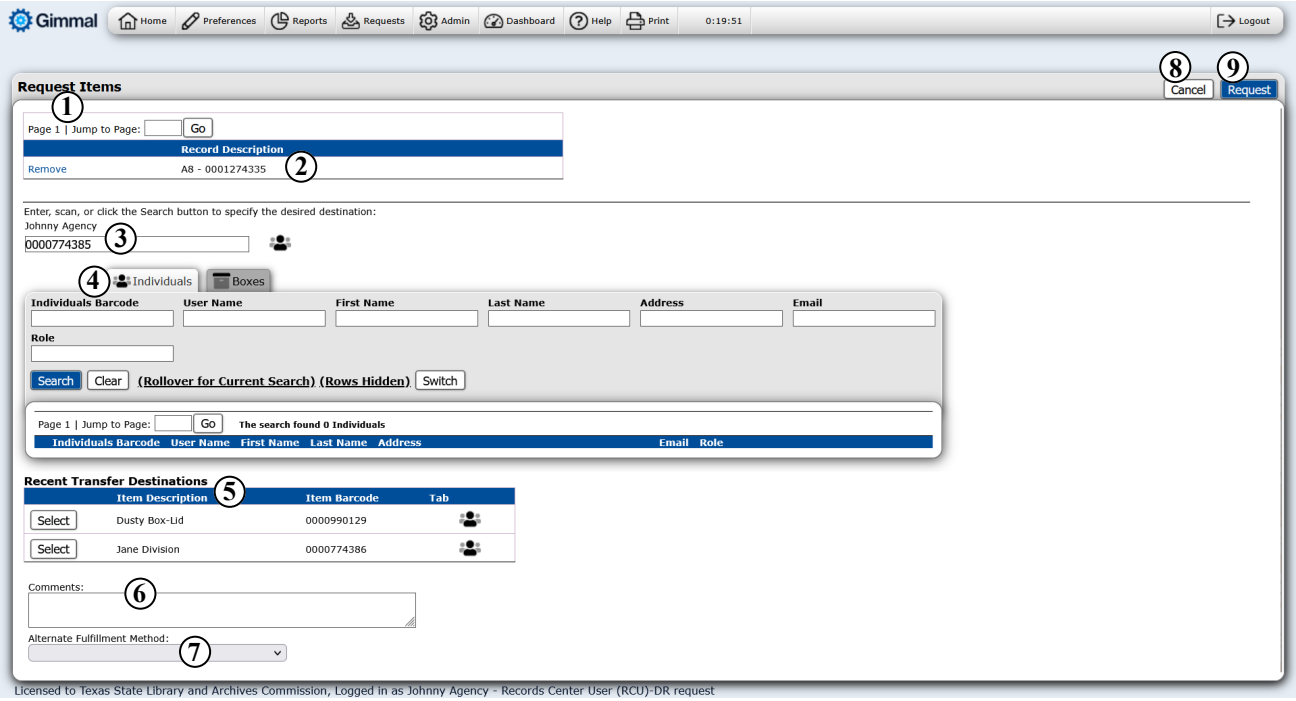


If the file appears on this page (or on another page if there are multiple pages): Select it **(1)**, click once **(2)** on **Request**, then click once **(3)** on **Delivery from SRC** and go **When the file exists in Gimmal: Request Items screen** *(Page 119)*.

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).

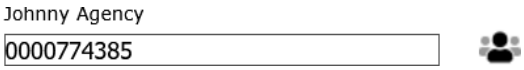
When the file exists in Gimmal: Request Items screen



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 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.

Change the delivery destination

Recent Transfer Destinations

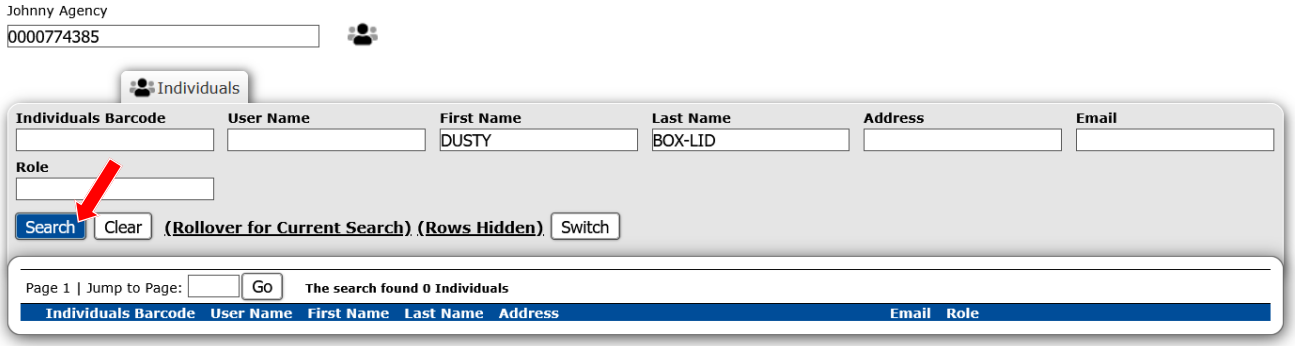


Sometimes, a coworker other than the person named here is to be the delivery destination. In the above illustration, Johnny Agency is the **delivery destination**. To change the delivery destination for the box, use the **Recent Transfer Destinations** section if the person is listed.

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

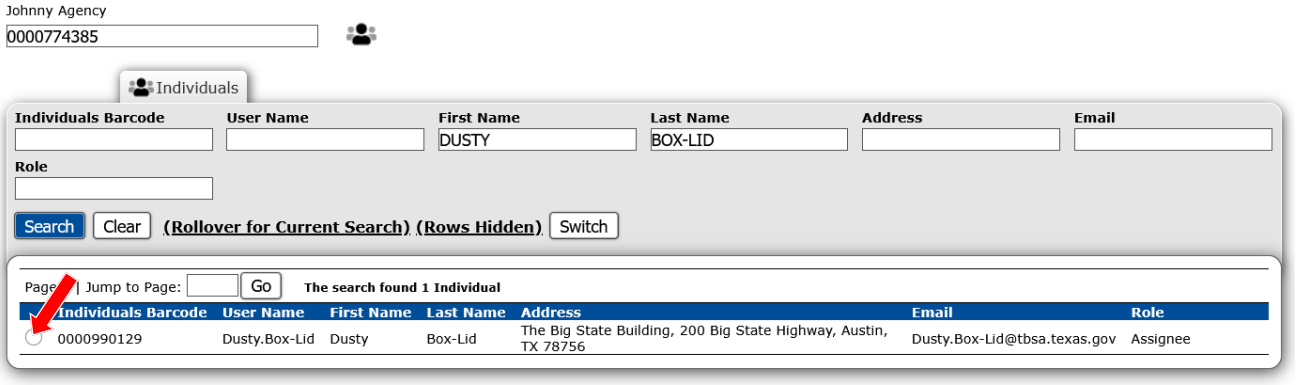
*Click once on **Select** and continue to Page 121.*

Individuals tab



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**.

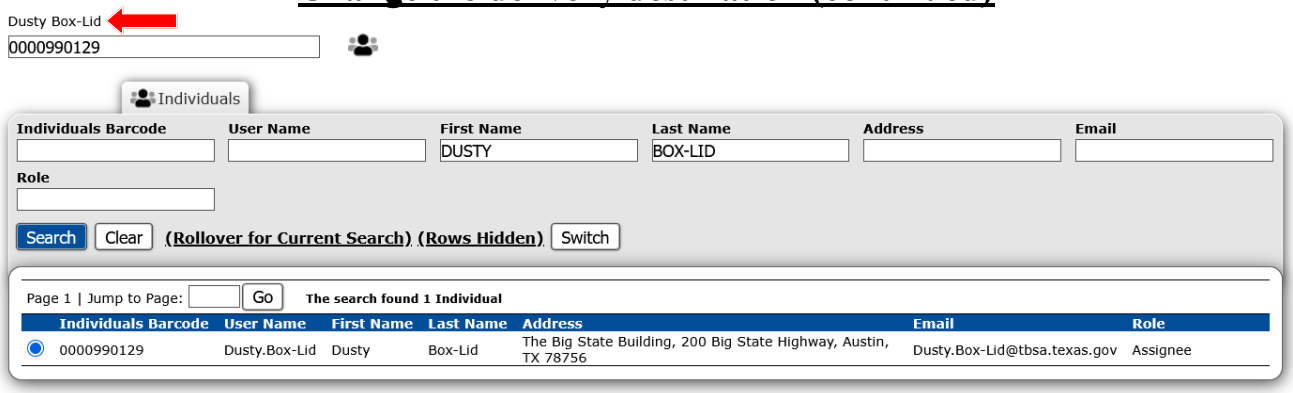
Data Example: Dusty (in First Name) Box-Lid (in Last Name)



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.

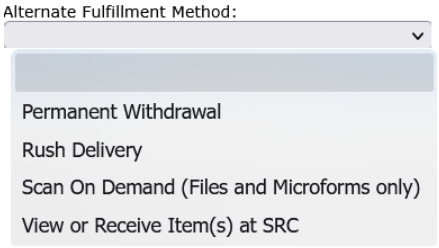
BOXYBIT *If the person who is to be the delivery destination cannot be found in Gimmal, contact the agency's Records Management team to get that person added to Gimmal.*

Change the delivery destination (continued)



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

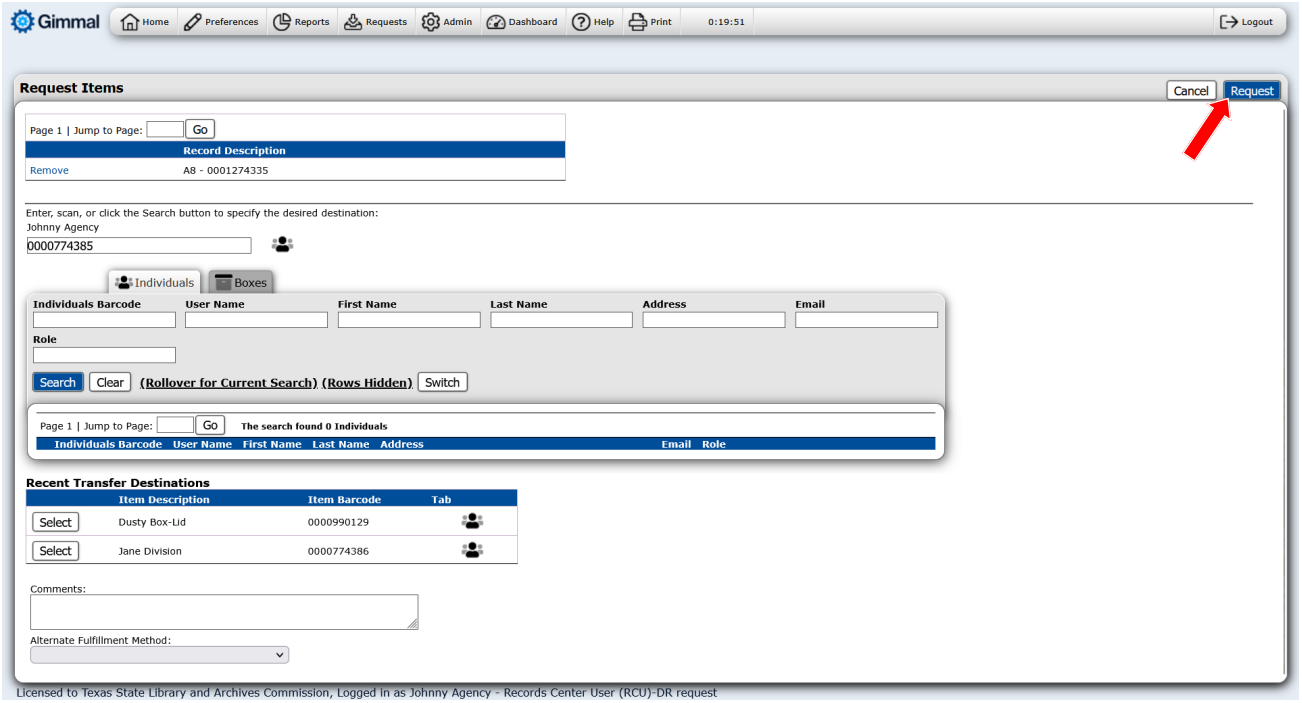


There are several options here (leave this field empty if this is a standard delivery):

- **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/slrm/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.

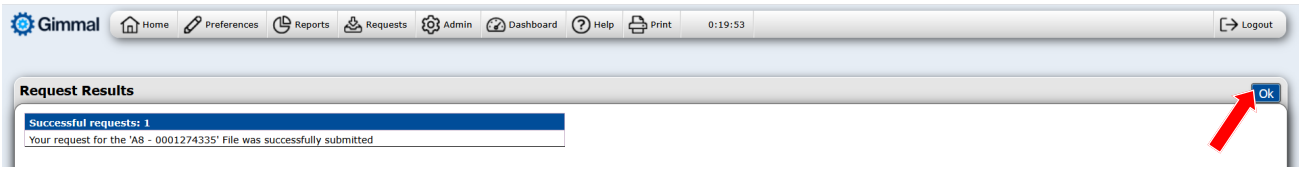
For more information about Alternate Fulfillment Method, please see ***Supplemental Information: Alternate Fulfillment Method*** (Page 177).

Submit the request delivery



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

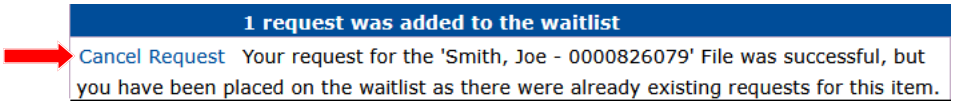
Request Results



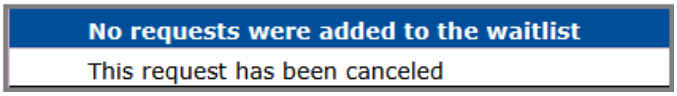
This screen lists the items for the delivery request. This process is complete. The SRC barcode label for each file is generated at the SRC and affixed to the file. The client can use the barcode number on the label to find the file in Gimmal when it is time to return the file to the SRC. **Do not remove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



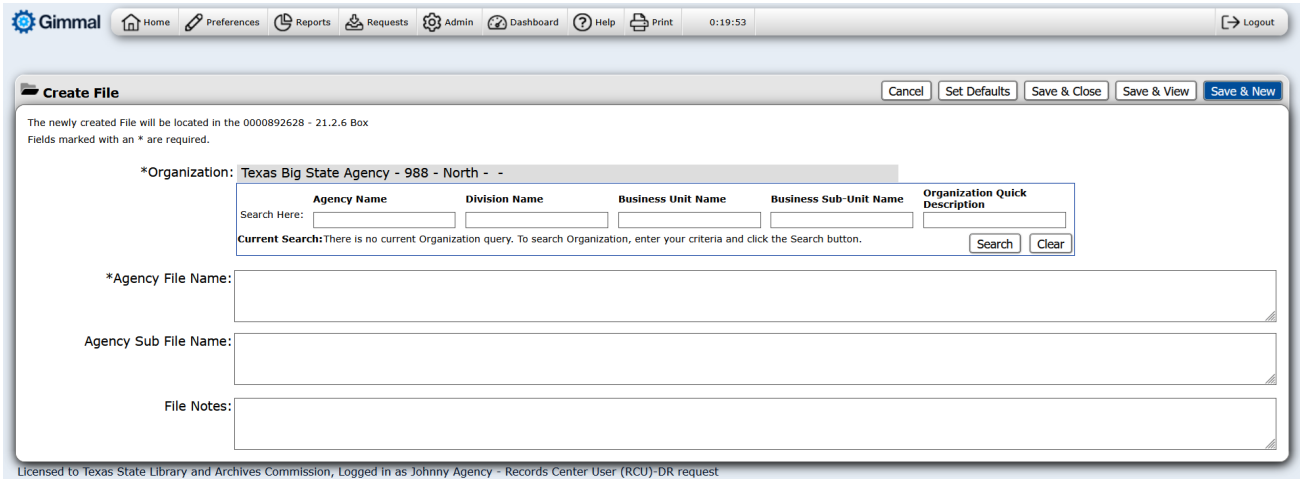
Waitlist means that someone else has already requested the item for delivery or it is assigned to someone else at the agency (not at its home location). This delivery request will be processed to the delivery recipient when the item is returned to the SRC unless the request is canceled.
To cancel this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



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

When the File does not exist in Gimmal, 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 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

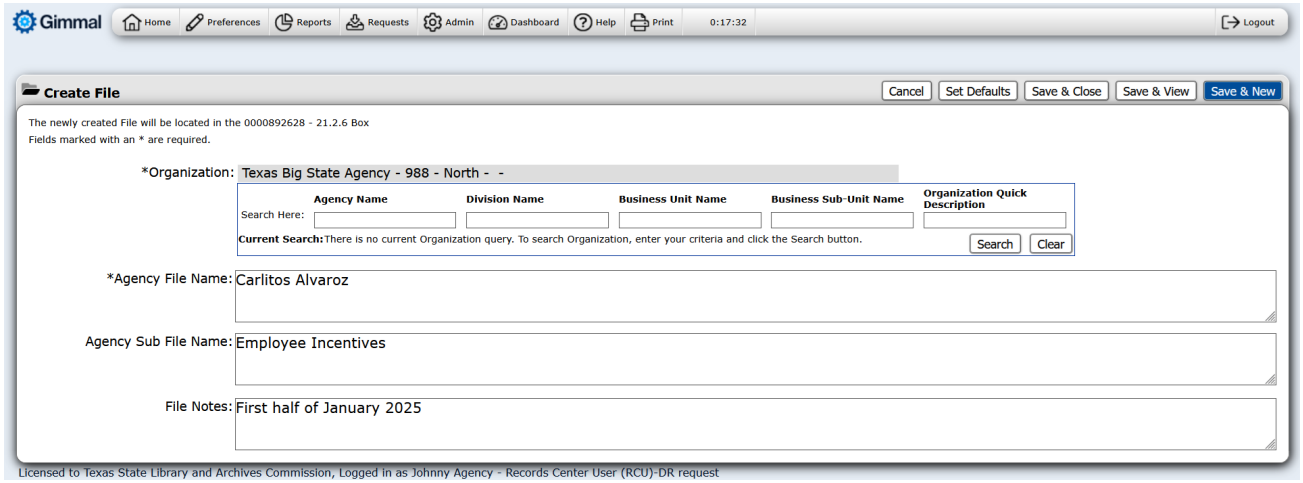
Agency Sub File Name

Agency Sub File Name 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 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

Completed: Create File screen



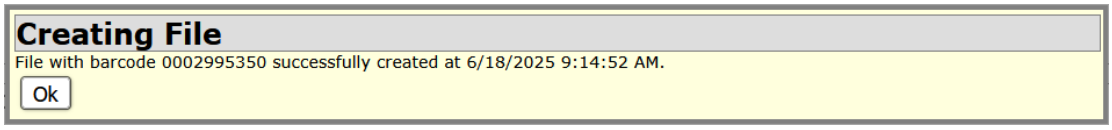
Save Options

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.

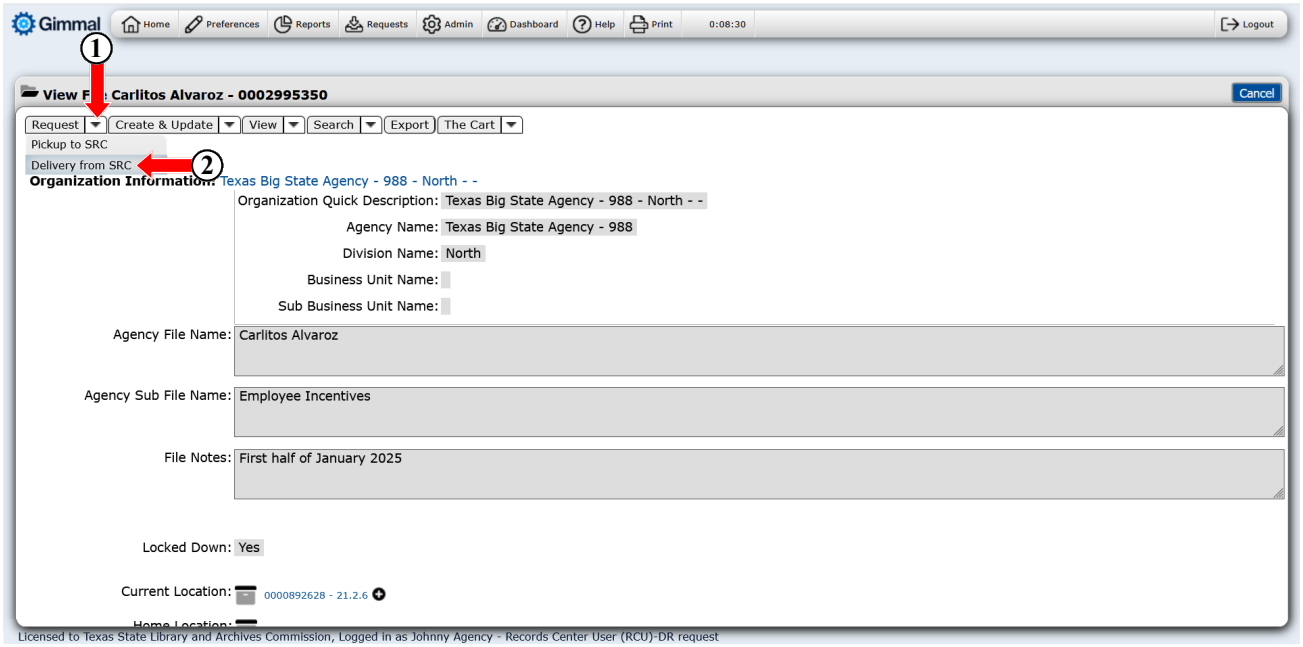
Creating File information



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.

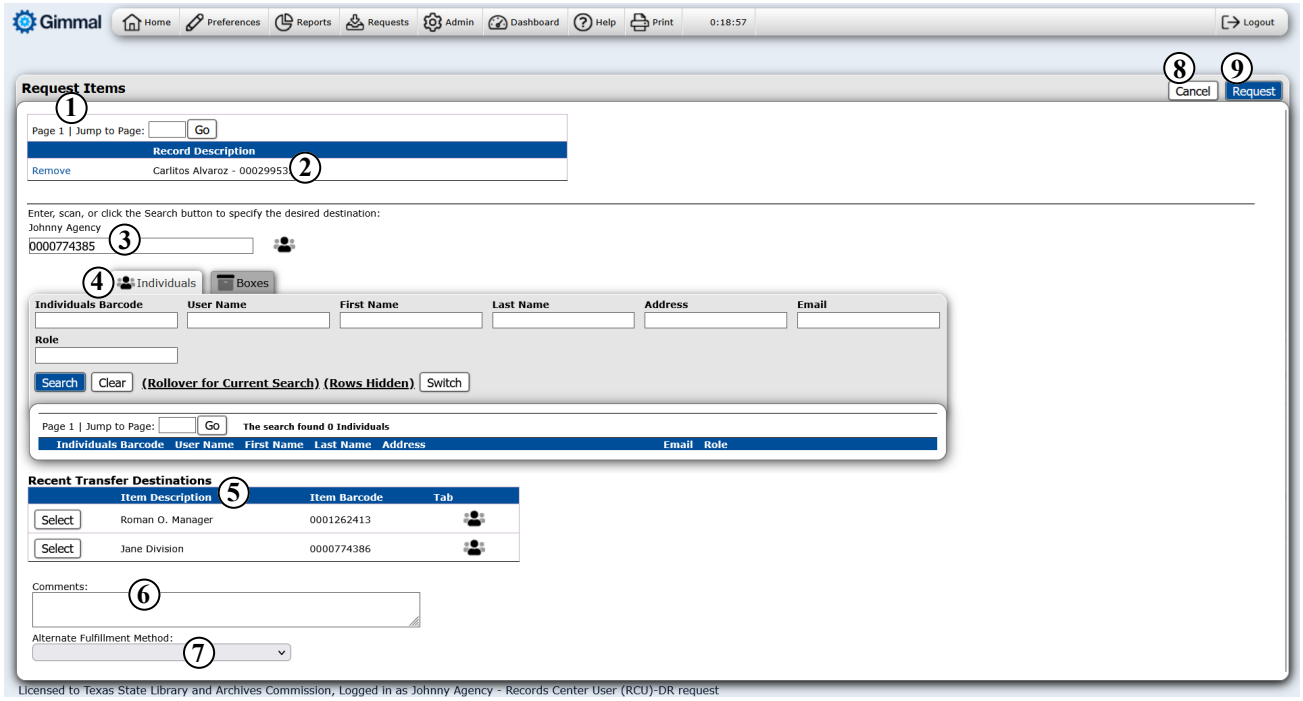
The create progress bar will display. When the above screen appears, it includes the File Barcode that was generated for this file. The barcode is the unique identification number applied to each item created in Gimmal. Click once on **Ok**. The next screen that appears is the View File screen.

View File screen: Request Delivery



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

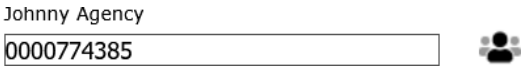
Sections on Request Items screen



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 127,* ***Change the delivery destination****. Do not use the* ***Boxes*** *tab.*
5. **Recent Transfer Destinations:** Please see **Change the delivery destination** (Page 127).
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 128).*
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

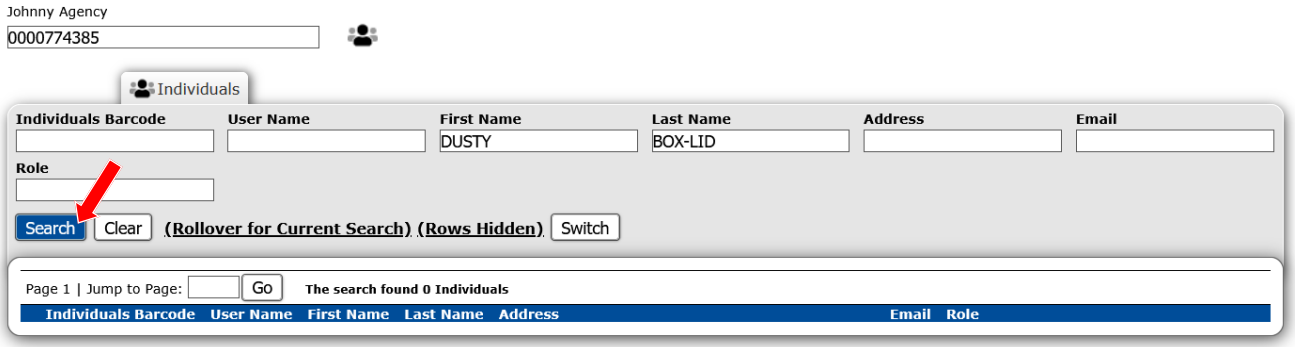


Sometimes, a coworker other than the person named here is to be the delivery destination. In the above illustration, Johnny Agency is the **delivery destination**. To change the delivery destination for the box, use the **Recent Transfer Destinations** section if the person is listed.

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

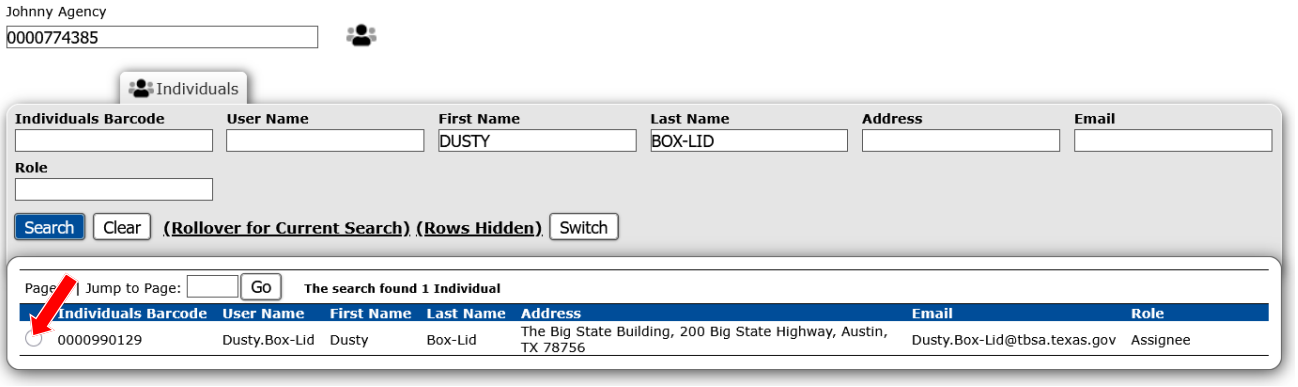
*Click once on **Select** and continue to Page 128.*

Individuals tab



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**.

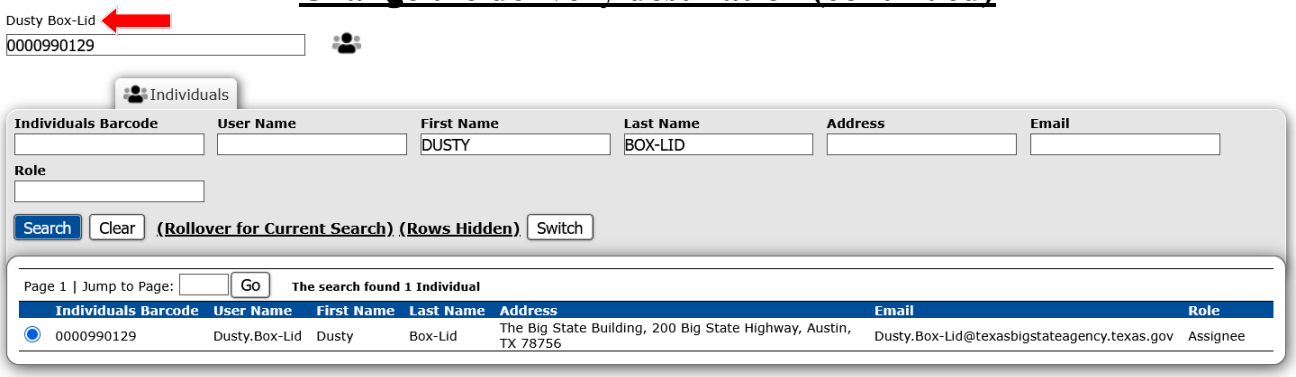
Data Example: Dusty (in First Name) Box-Lid (in Last Name)



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.

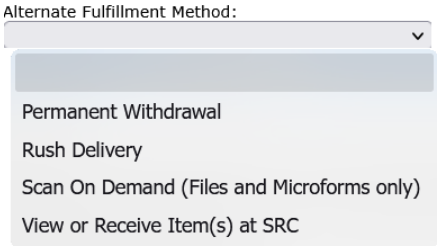
BOXYBIT *If the person who is to be the delivery destination cannot be found in Gimmal, contact the agency's Records Management team to get that person added to Gimmal.*

Change the delivery destination (continued)



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

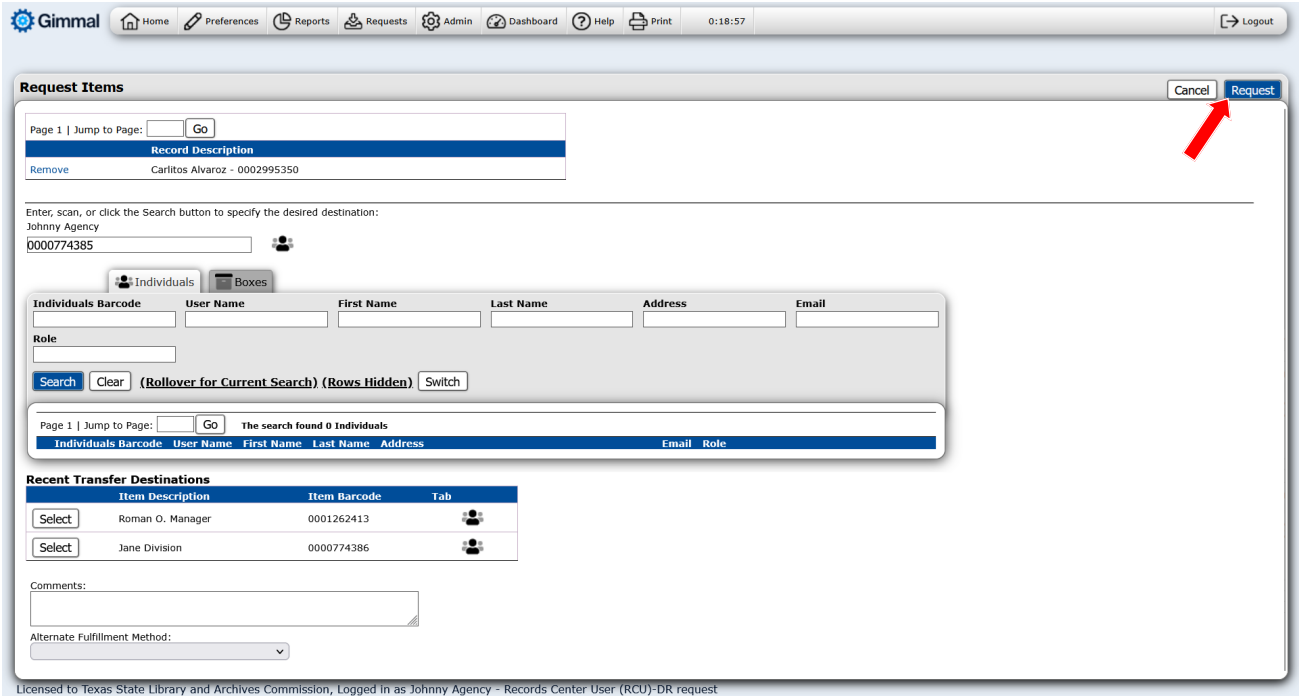


There are several options here (leave this field empty if this is a standard delivery):

- **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/slrm/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.

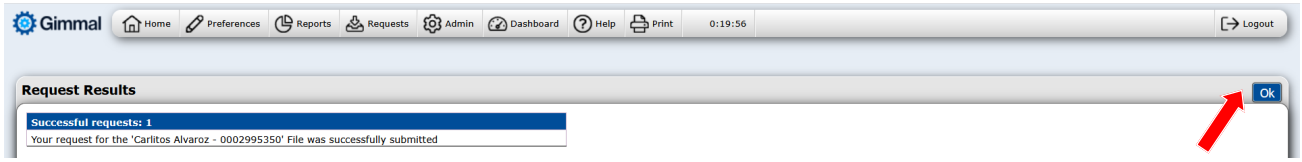
For more information about Alternate Fulfillment Method, please see ***Supplemental Information: Alternate Fulfillment Method*** (Page 177).

Submit the request delivery



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

Request Results



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.

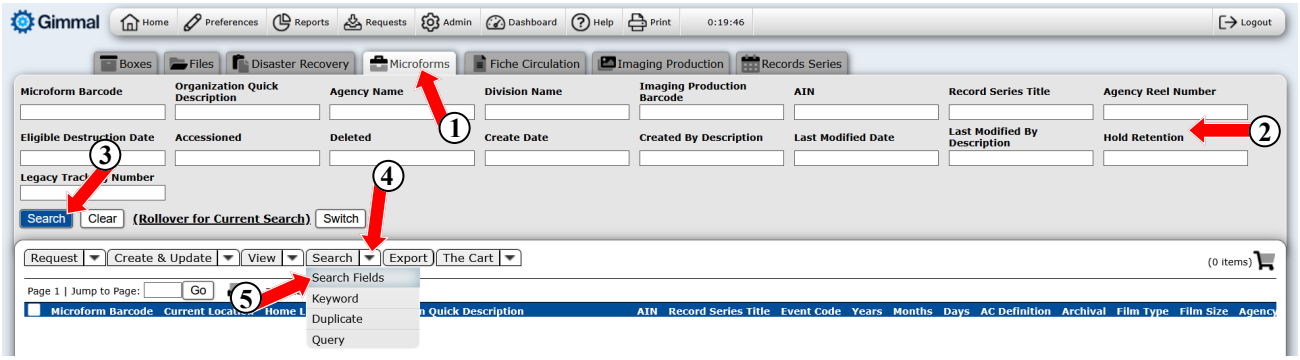
To cancel any Request, call the SRC Circulation Desk: 512-475-5155.

NOTES

Request Delivery from SRC: Fiche Circulation: Microfiche Jackets

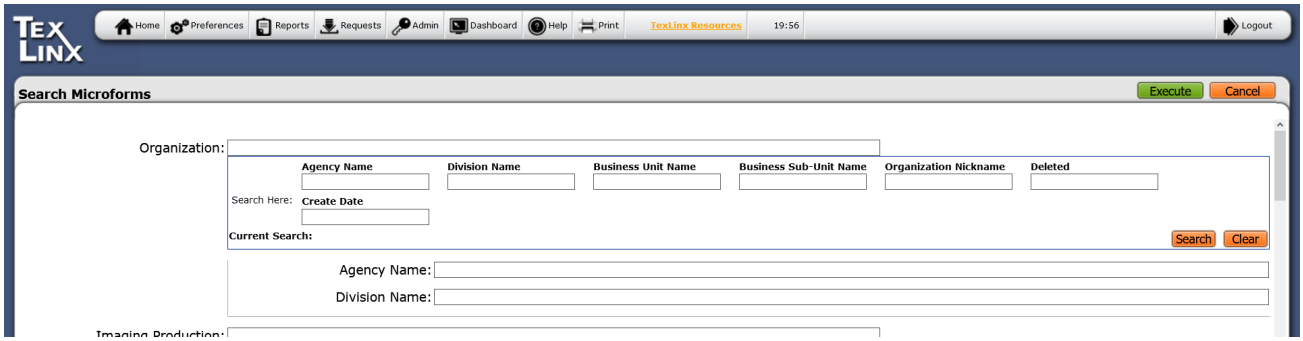
BOXYBIT ***Gimmal clients outside of Austin:*** *Check with the agency's Records Management team to determine if Gimmal is used to Request Delivery since additional charges may apply.* This section explains how to request delivery for individual microfiche jackets (also known as a microfiche partial 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



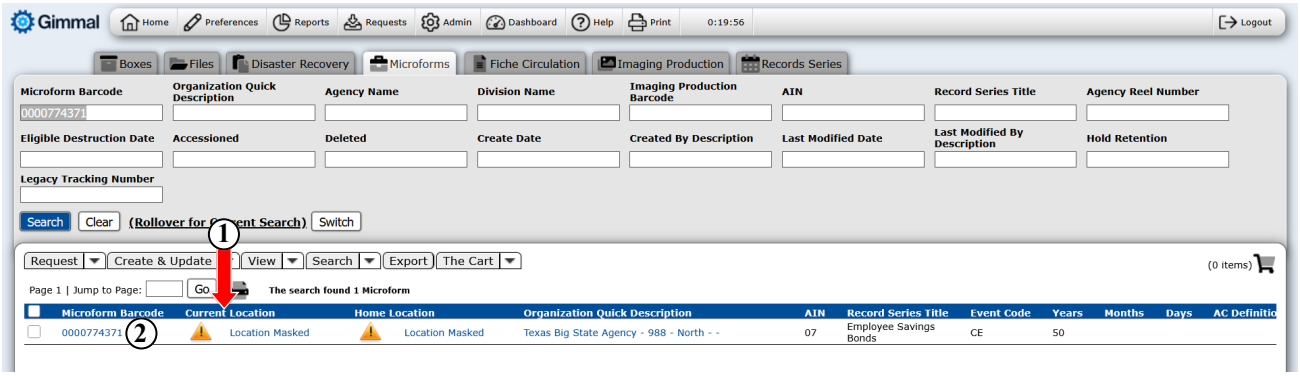
1. Click once on the **Microforms** item type tab.
2. Enter search terms into any of the **Quick Search** fields to find the microfiche bundle.
3. Click once on **Search** (if the grid populates, continue to **Search results, select the microfiche bundle barcode** on Page 132).
   OR
4. Click once on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

Search Microforms screen



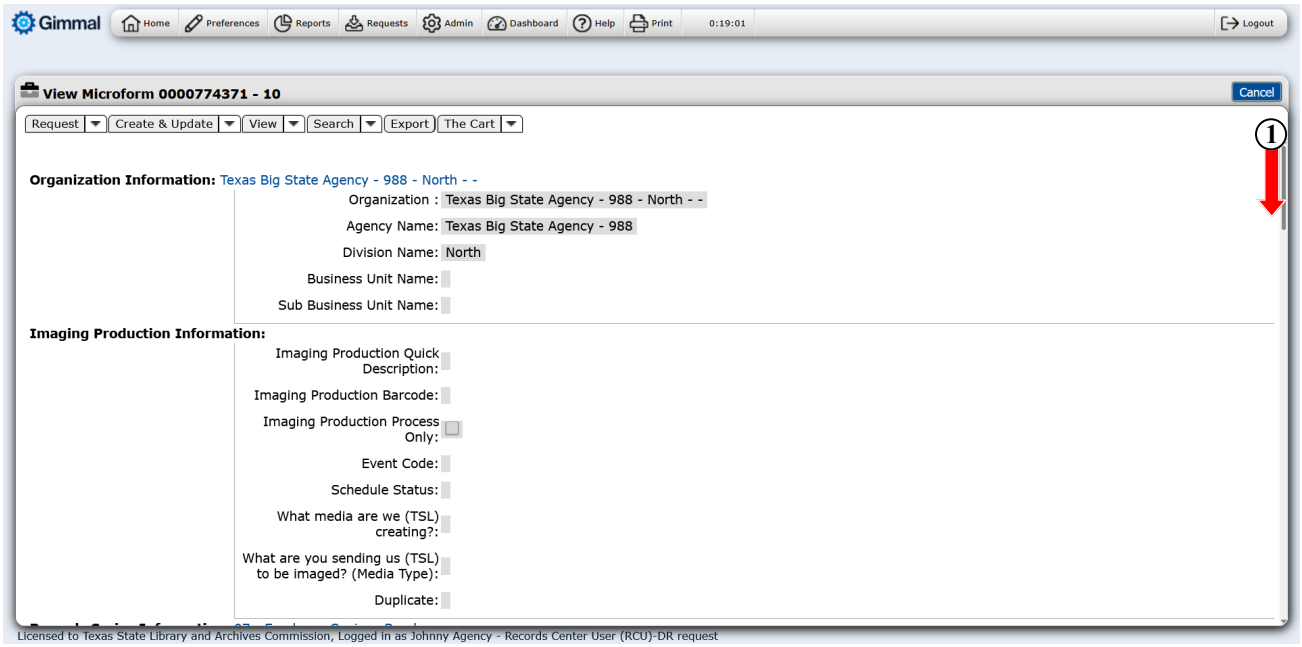
Enter search information into any fields (including the **Gimmal System Fields** at the bottom half of the screen) to find the microfiche bundle. Click once on **Execute**.

Search results, select the microfiche bundle barcode



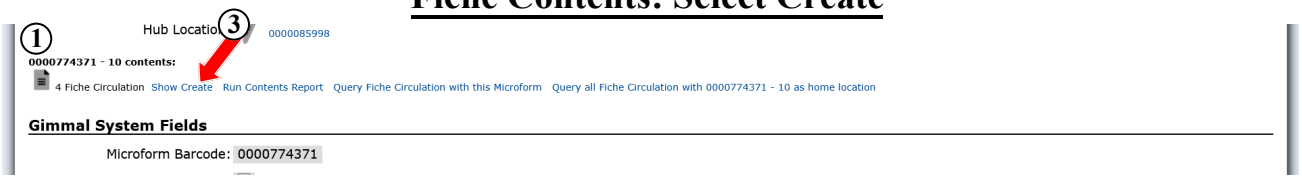
Regardless of the Search method used from Page 131, the above illustration is the next screen. If microfiche jackets are needed for multiple microfiche bundles, create separate requests from each bundle since the requests are completed one at a time. Individual microfiche jackets are not identified on 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



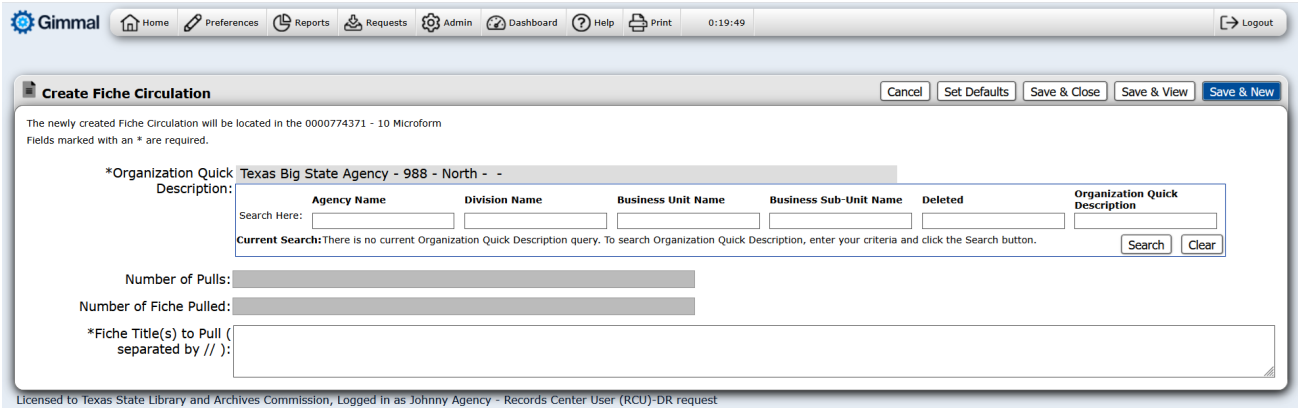
(1) Scroll down the page to where **Fiche Contents** information is just above the **Gimmal System Fields** section.

Fiche Contents: Select Create

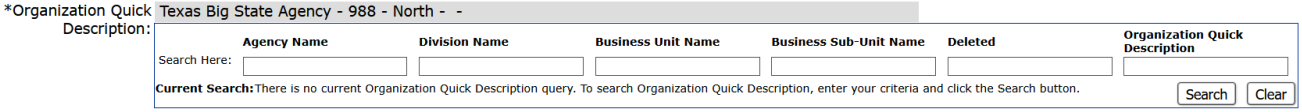


The Contents section is where a record of previous Fiche Circulations are kept. If this fiche bundle has had previous Fiche Circulation requests, the Contents section will look like the above example **(1)**. If there are no previous Fiche Circulation Requests, it will look like the below example **(2)**. 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.

Create Fiche Circulation screen



*Organization



The **Organization** is the Organization assigned to the Microfiche bundle. **Do not edit this field.**

Disregard these two fields

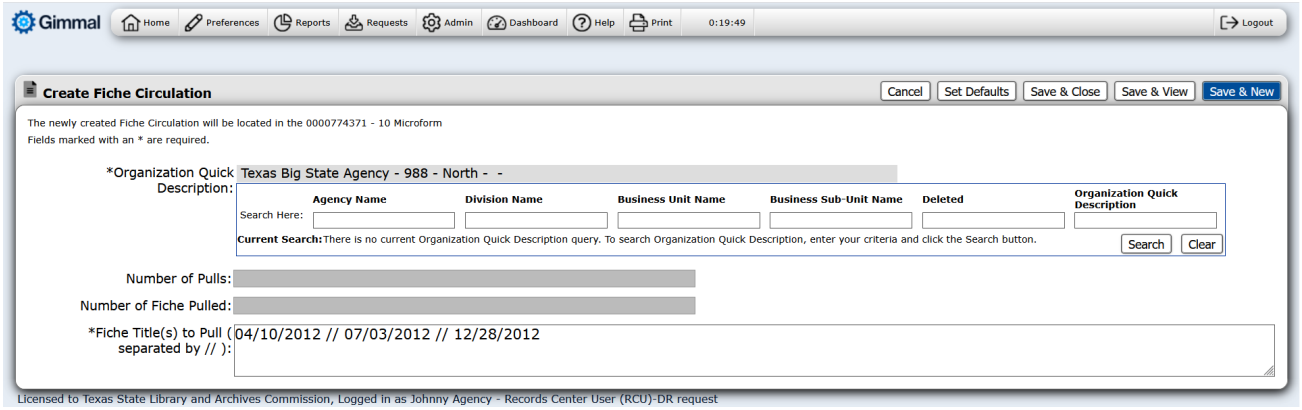
Number of Pulls is a field that is completed by an employee at the SRC. The software does not allow this field to be hidden during this process.

Number of Fiche Pulled 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

Completed: Create Fiche Circulation screen:

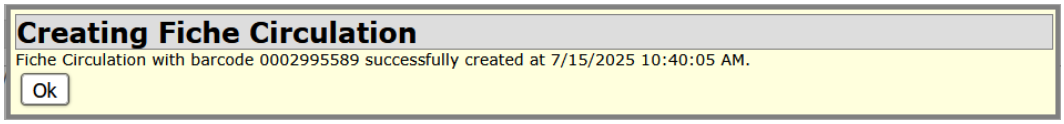


Save Options

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 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



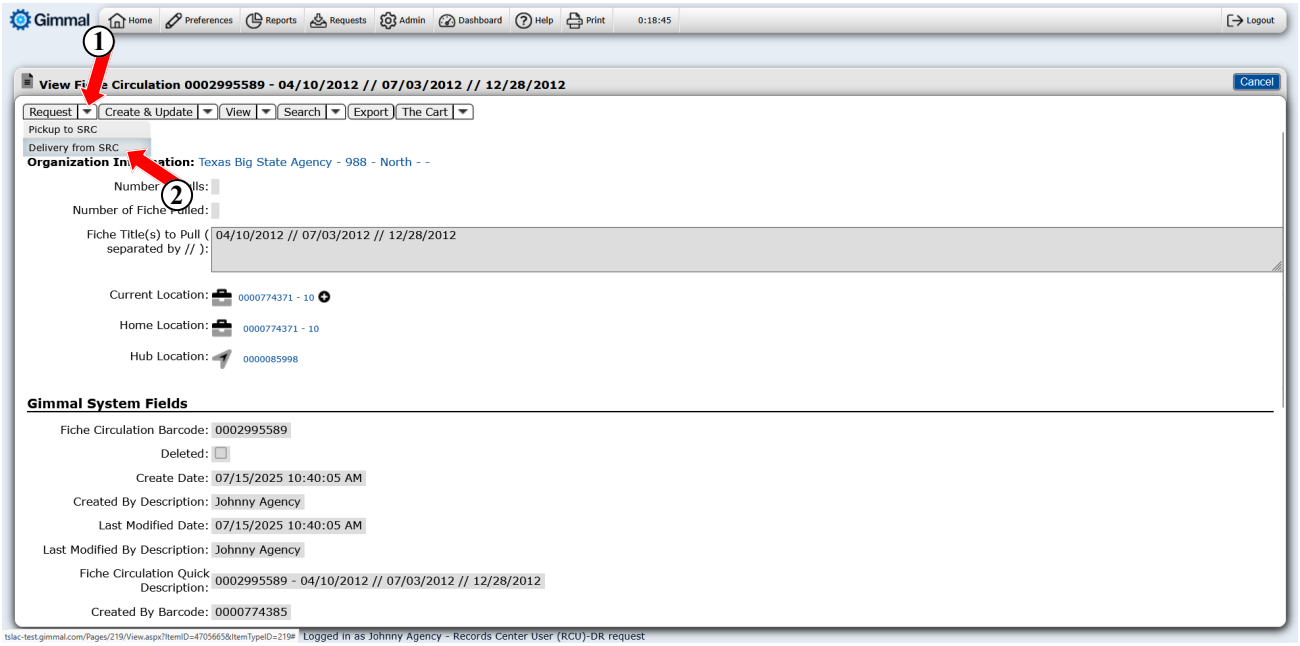
The create progress bar will display; if the above information does not appear, an error message appears at the top of the screen. Correct the error and click the original save option.

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

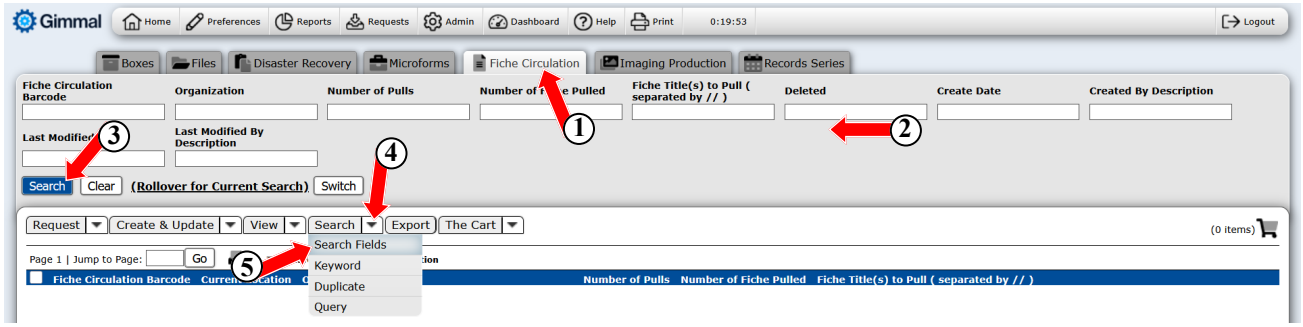
After clicking Save & View



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.*

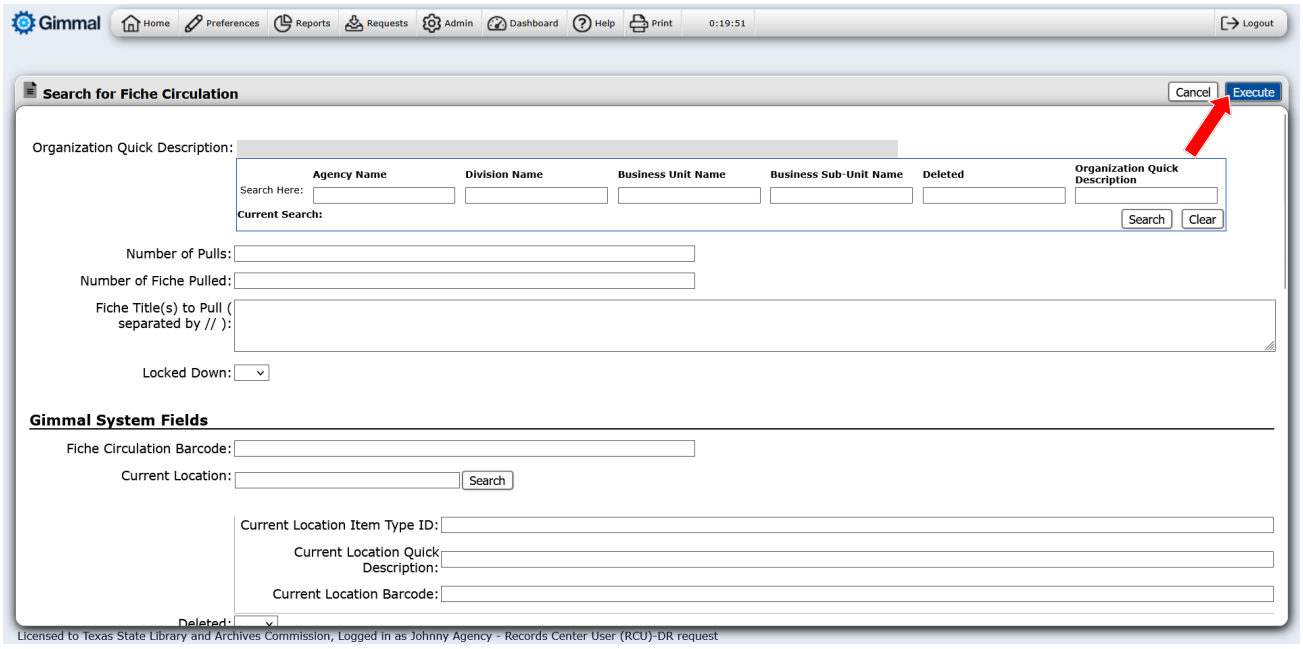
After clicking Save & Close



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:

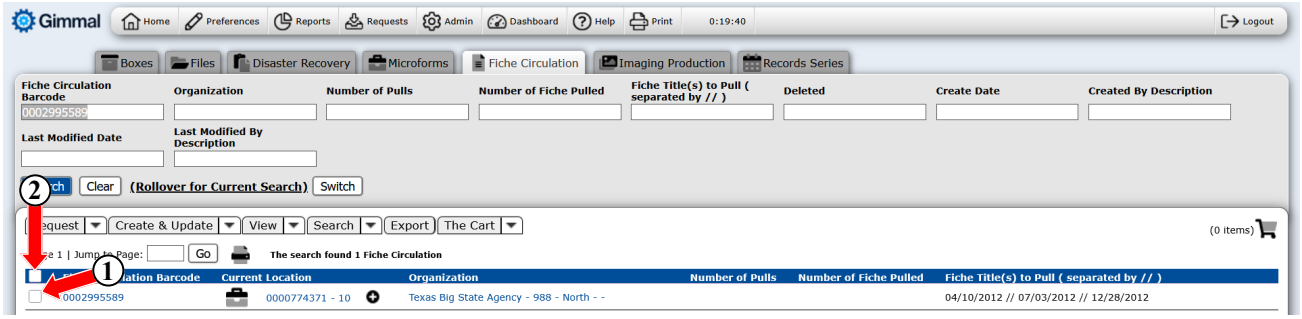
1. Click once on the **Fiche Circulation** item type tab to search.
2. Enter search terms into any of the **Quick Search** fields to find the **Fiche Circulation.**
3. Click once on **Search** and if results populate the grid, continue to **Search results, select the item** (Page 138).
   OR
4. Click once on **Search**.
5. Click once on **Search Fields** and continue below.

Search for Fiche Circulation screen



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**.

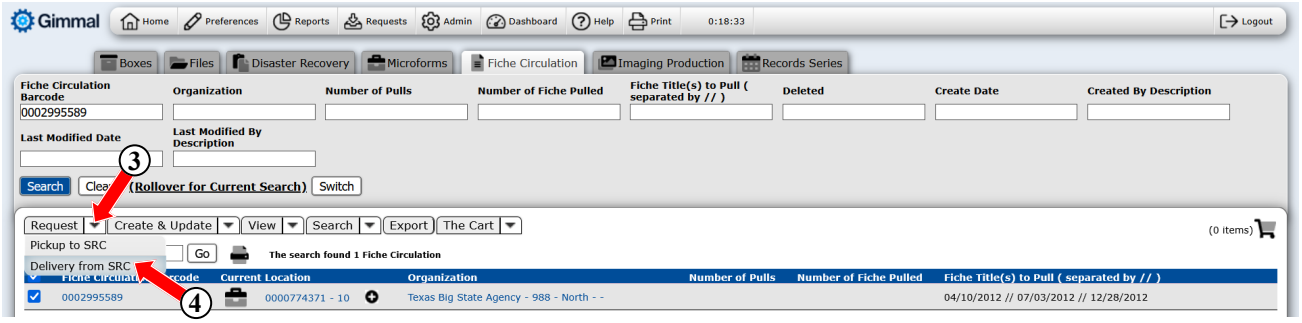
Search results, select the item



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.

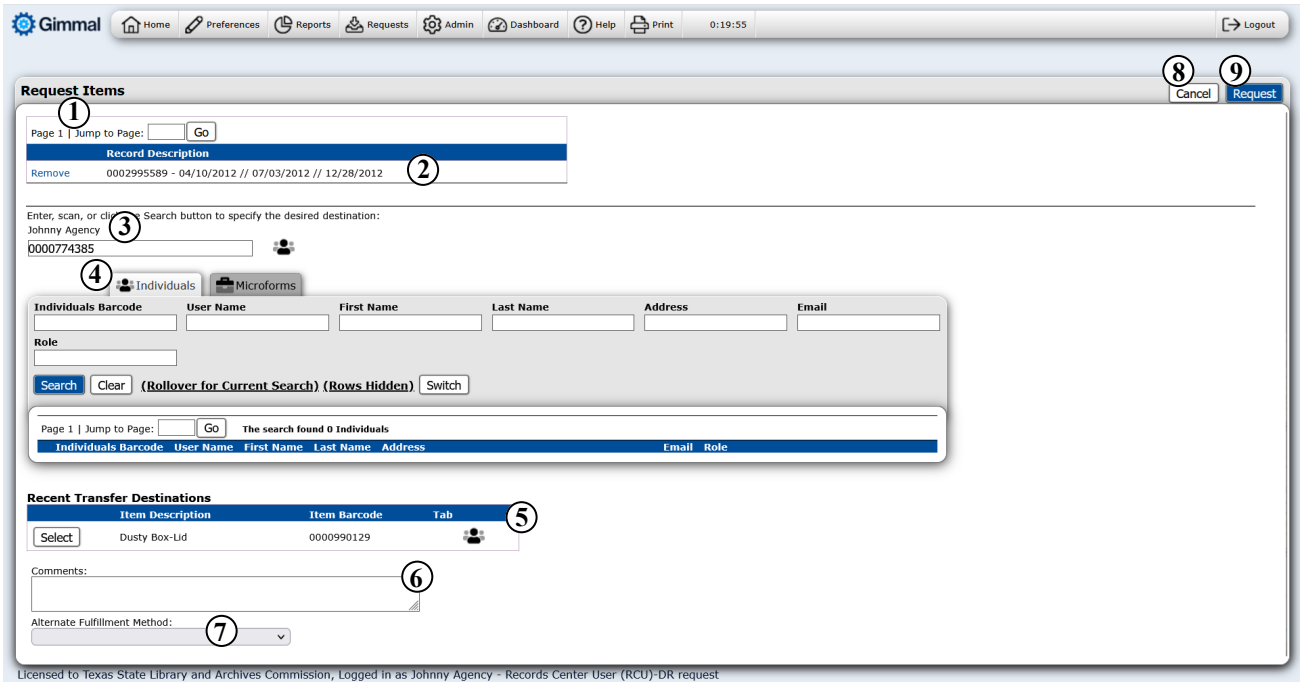
BOXYBIT *A setting in Preferences could limit the number of items that appear on a single home page. Clicking the Select All checkbox selects the items on this single page, not the items on every page (if there is more than one page noted above the column headers ribbon). To increase/ decrease the number 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



After selecting the Fiche Circulation item(s), click once **(3)** on **Request** and click once **(4)** on **Delivery from SRC**.

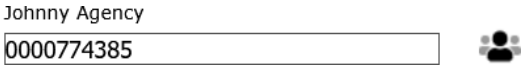
Request Items screen



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

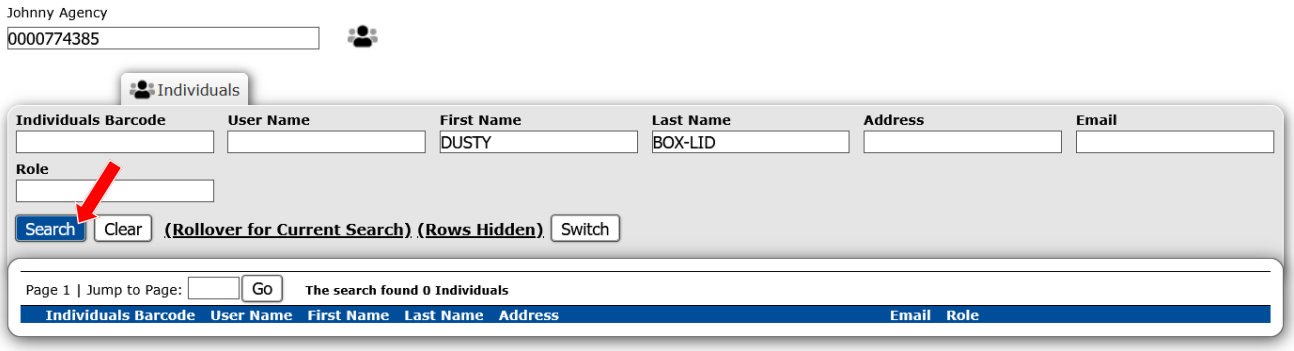


Sometimes, a coworker other than the person named here is to be the delivery destination. In the above illustration, Johnny Agency is the **delivery destination**. To change the delivery destination for the box, use the **Recent Transfer Destinations** section if the person is listed.

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

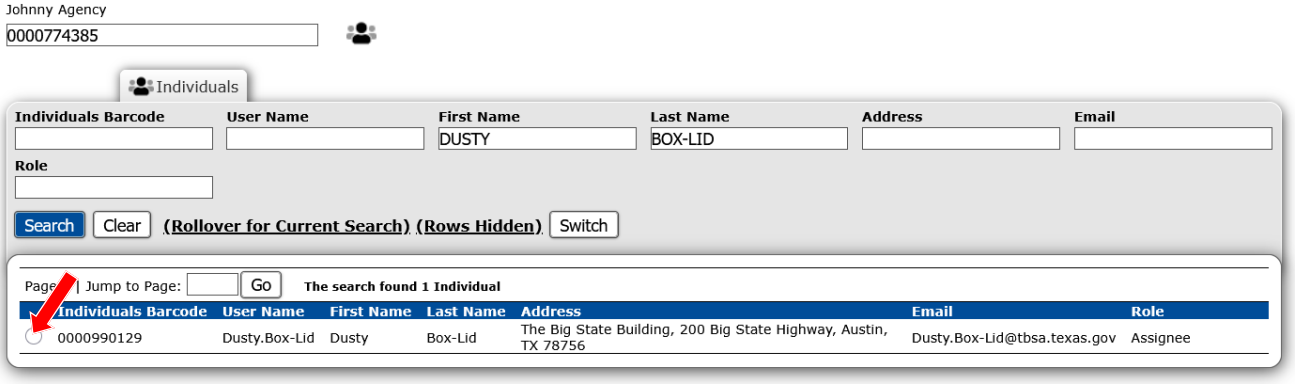
*Click once on **Select** then continue to Page 141.*

Individuals tab



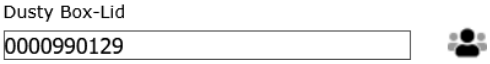
To use the **Individuals** tab to search for the individual at the agency who is going to be the delivery destination, enter information for that person in any of the **Quick Search** fields to find that person and click once on **Search**.

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



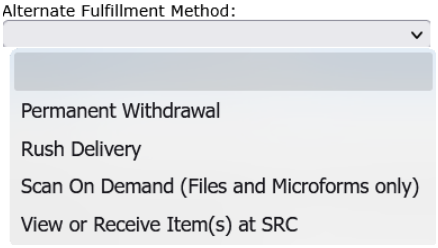
When a search result appears, click once on the radio button to the left of the person who is to be assigned as the delivery destination for this delivery request.

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.*



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

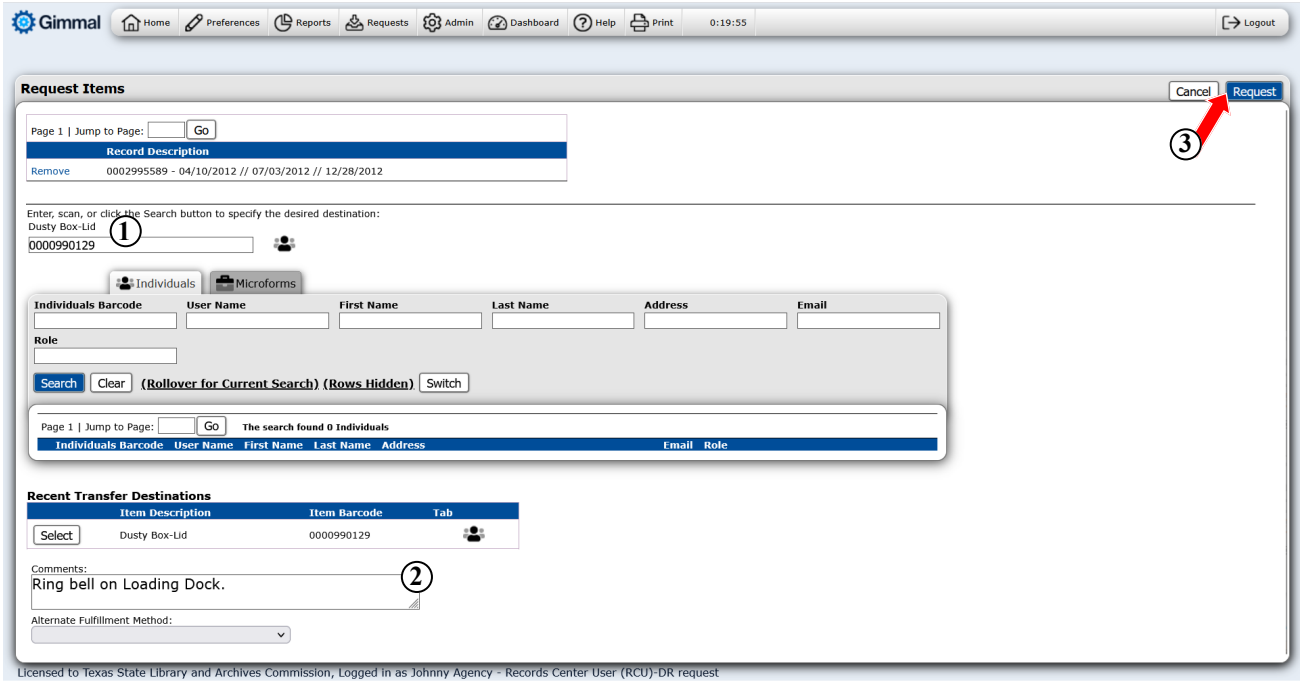


There are several options here (leave this field empty if this is a standard delivery):

- **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/slrm/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.

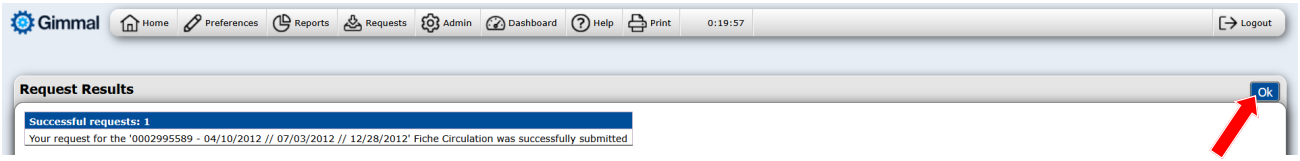
For more information about Alternate Fulfillment Method, please see ***Supplemental Information: Alternate Fulfillment Method*** (Page 177).

Review the Request Items screen



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 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.

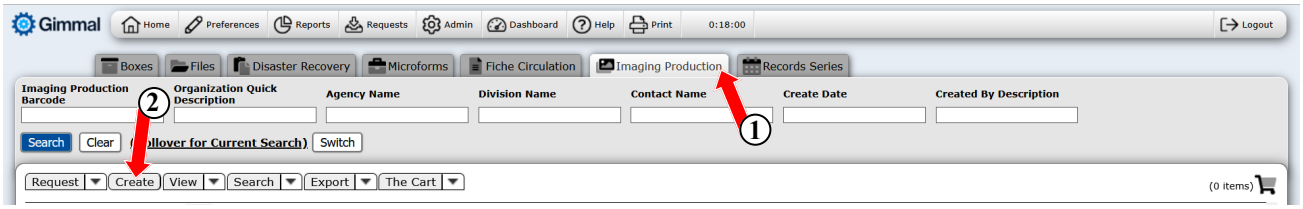
To cancel any Request, call the SRC Circulation Desk: 512-475-5155.

NOTES

NOTES

Imaging Production:
Create a Work Order for SRC imaging

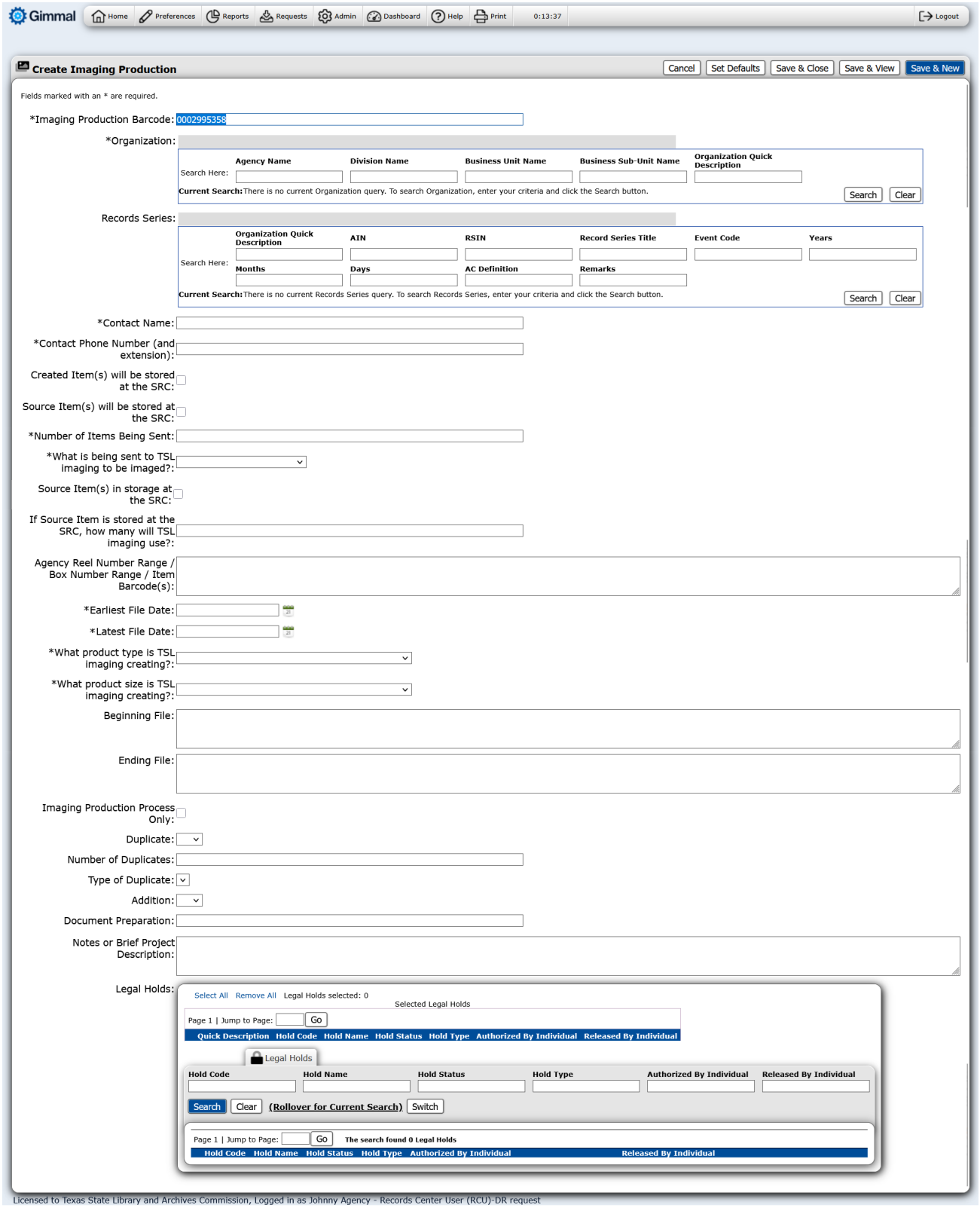
The **Imaging Production** item type tab is used to instruct the SRC imaging department about what needs to be done for a finished product (for example, filming a box of paper files to be images on a reel of microfilm).



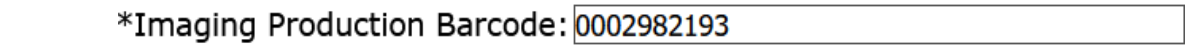
1. Click once on the **Imaging Production** item type tab.
2. Click once on **Create** in the Action Buttons.

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

Create Imaging Production

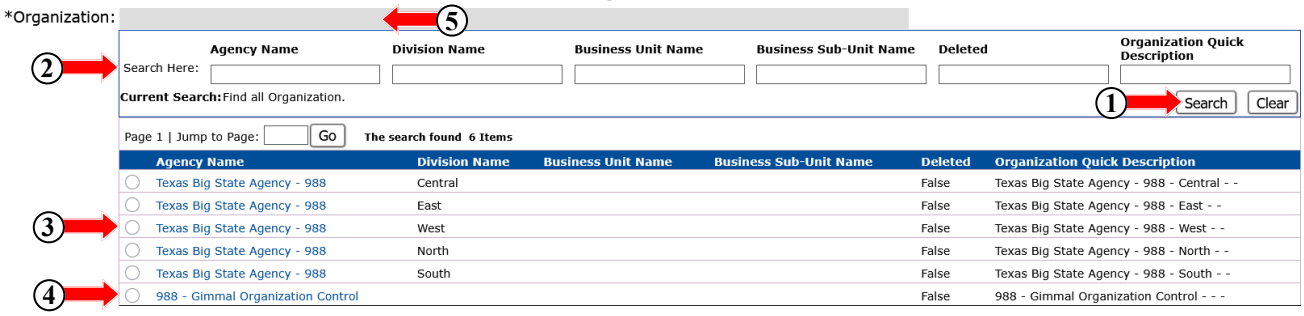


*Imaging Production Barcode



The **Imaging Production Barcode** is an auto-generated barcode created by Gimmal that is assigned to the Imaging Production request. This field cannot be edited.

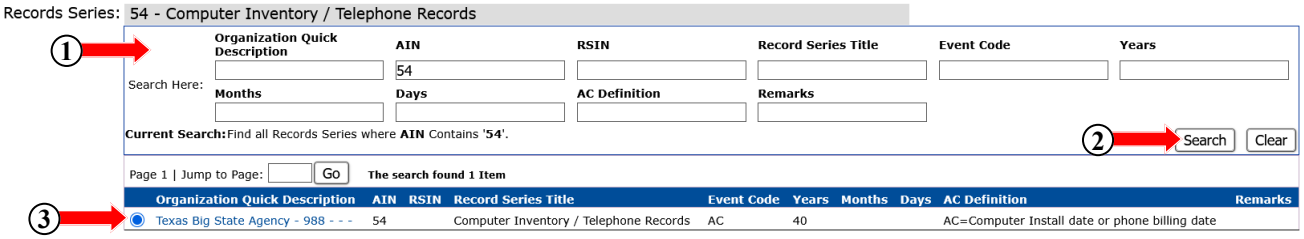
*Organization



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.*

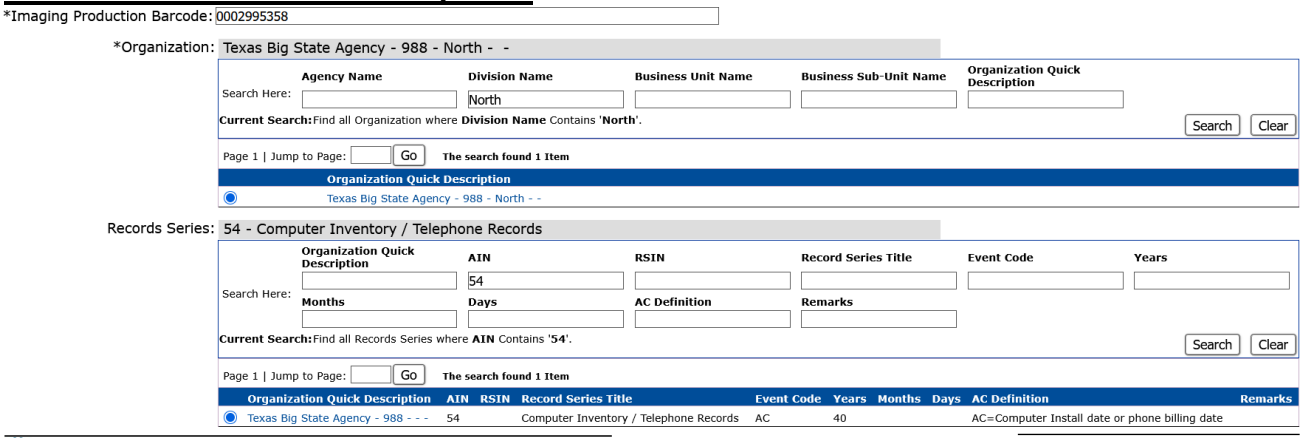
Records Series



Records Series 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:



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: Johnny Agency

*Contact Phone Number (and extension): 512-555-4567

Created Item(s) will be stored at the SRC:

Source Item(s) will be stored at the SRC:

*Number of Items Being Sent: 3

*What is being sent to TSL imaging to be imaged?

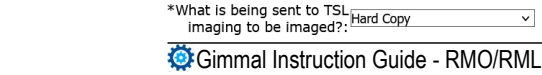
What is being sent to TSL imaging to be imaged is a required field. This is the medium type for the source documents being provided to the SRC imaging department.

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:



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): _____

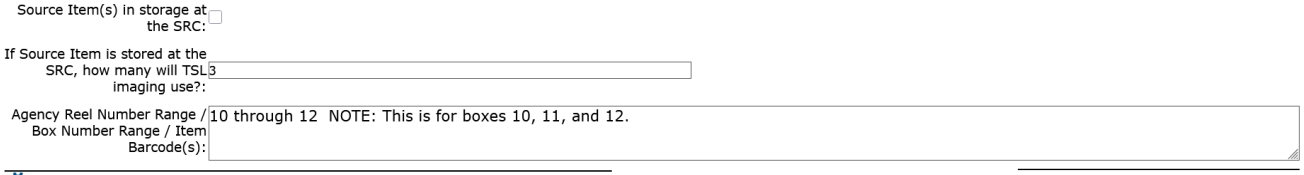
The beginning and ending container numbers and/or the first and last Gimmal barcode numbers for the Source Items TSL imaging will be using. If using box numbers or reel numbers, make sure each container number is visible on the container. In this field, list only the first and last container numbers 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:



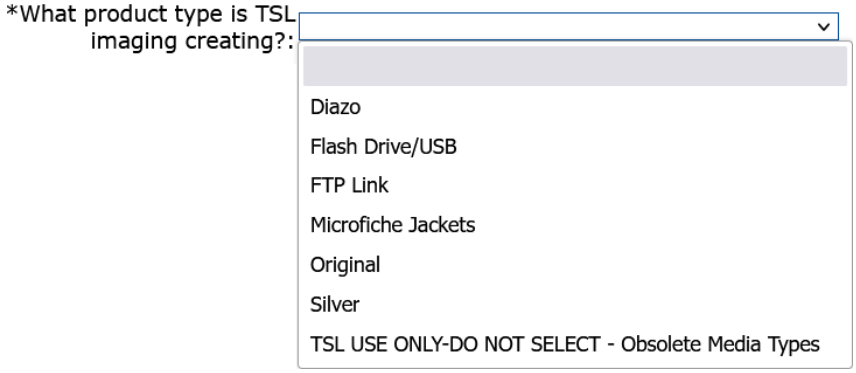
*Earliest File Date

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

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.*

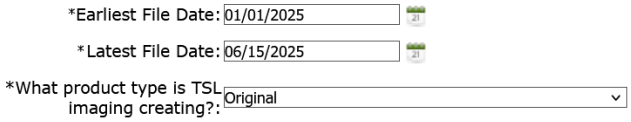
What product type is TSL imaging creating?



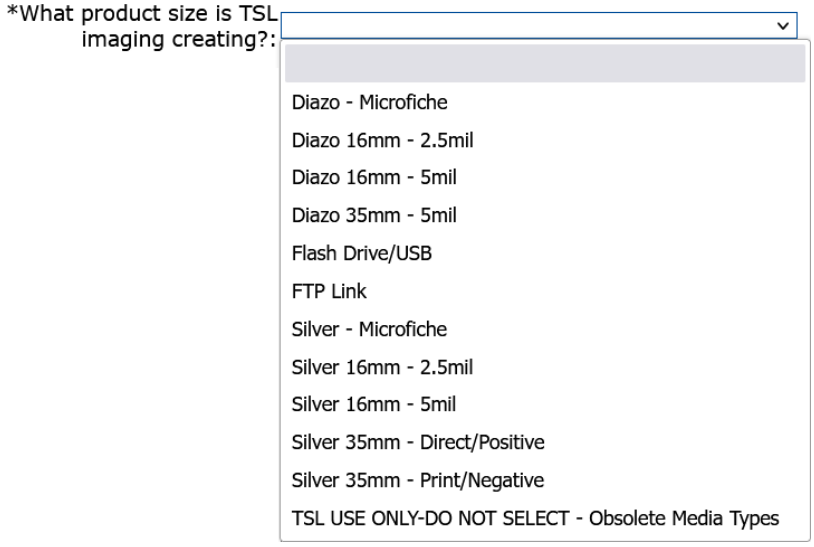
What is selected here tells the SRC imaging department what medium type the final imaging product will be.
BOXYBIT *With the exception of Diazo, all media types are eligible to be stored at the SRC*:

- **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:



*What product size is TSL imaging creating?



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:

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.

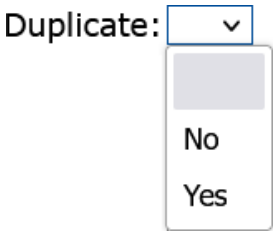
How these fields look when completed:

Beginning File: Adams, Michael

Ending File: Ybarro, Julio

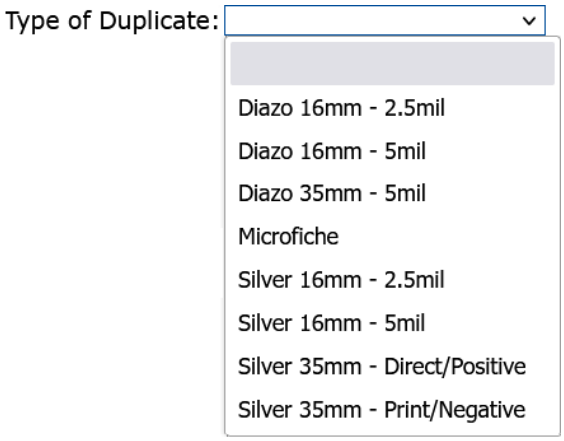
Imaging Production Process Only:

Duplicate



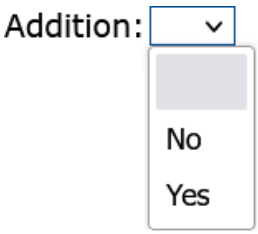
Select **No** if duplicates of what is being produced are not needed and go to **Addition**.
Select **Yes** if duplicates of what is being produced are needed, then complete the next two fields.

Number of Duplicates: The number of duplicates to be created by the SRC imaging department as the final product.



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: 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:

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:

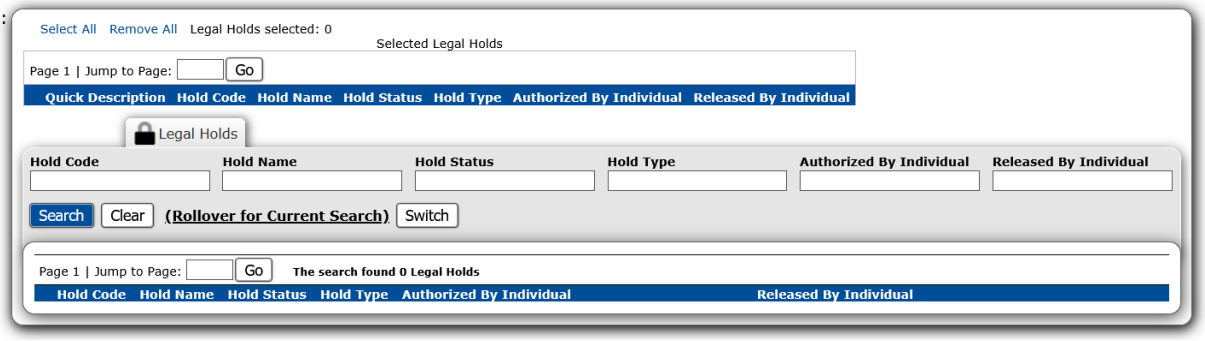
Notes or Brief Project Description is a catch-all field to provide the client an opportunity to include anything that might not be included in the fields on this form. This is also where the **Addition** information is provided. Any character can be used except for the Pipe symbol. Do not press the Enter/Return 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:

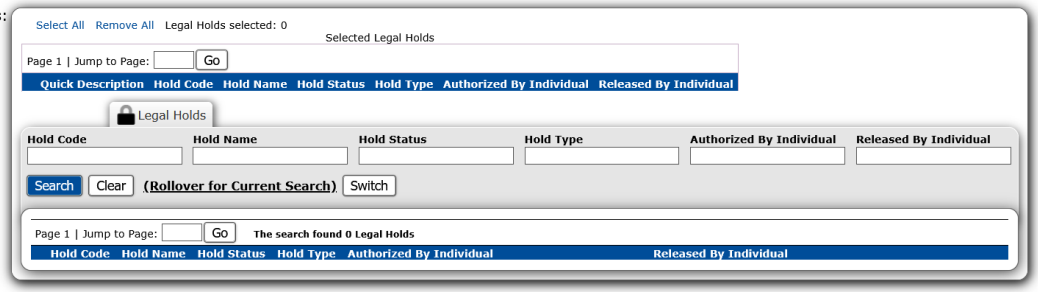


How these fields look when completed:

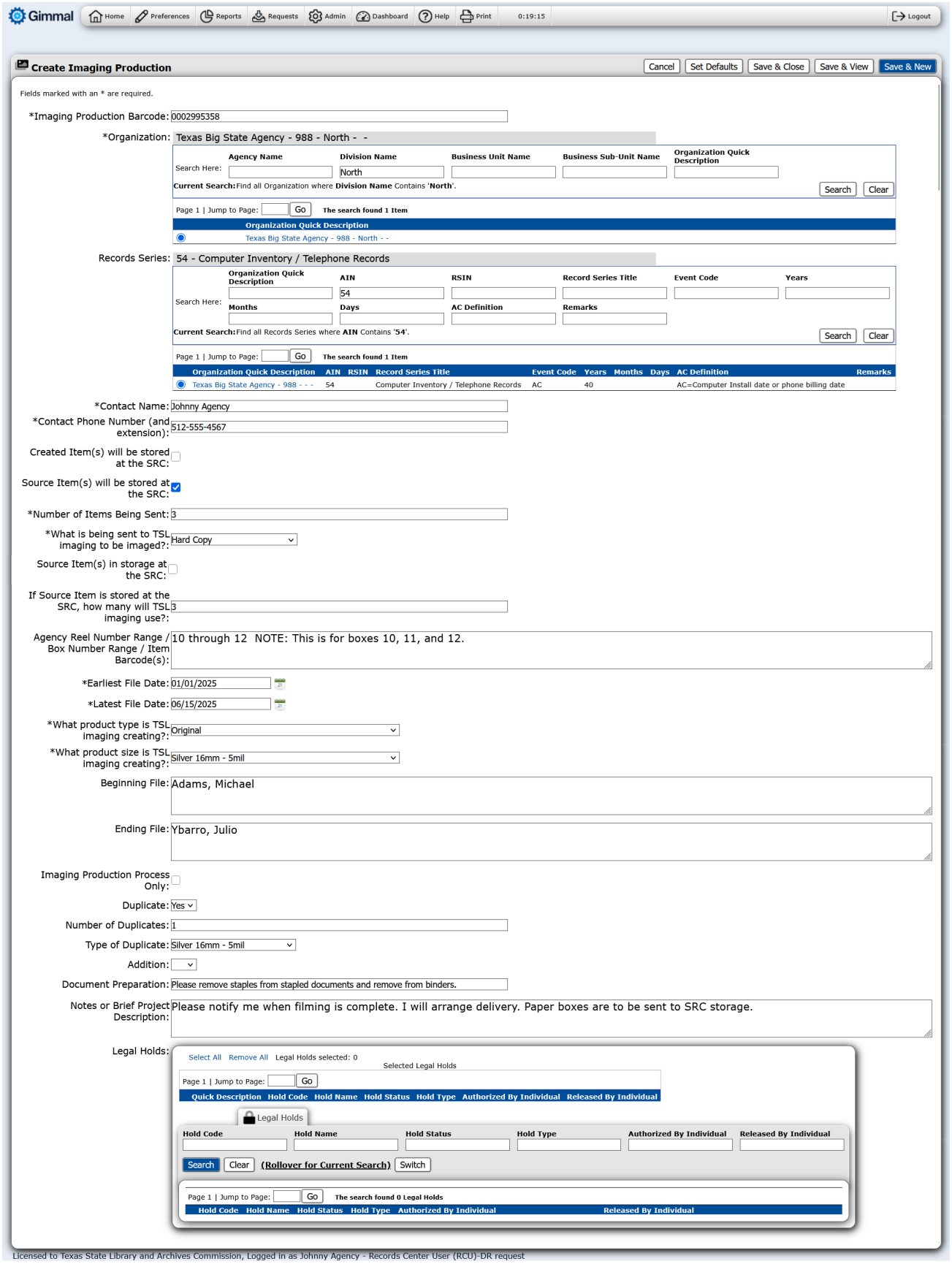
Document Preparation: Please remove staples from stapled documents and remove from binders.

Notes or Brief Project Description: Please notify me when filming is complete. I will arrange delivery. Paper boxes are to be sent to SRC storage.

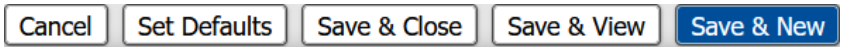
Legal Holds:



Completed: Create Imaging Production:



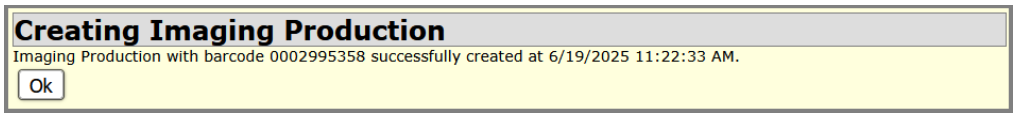
Save Options



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.

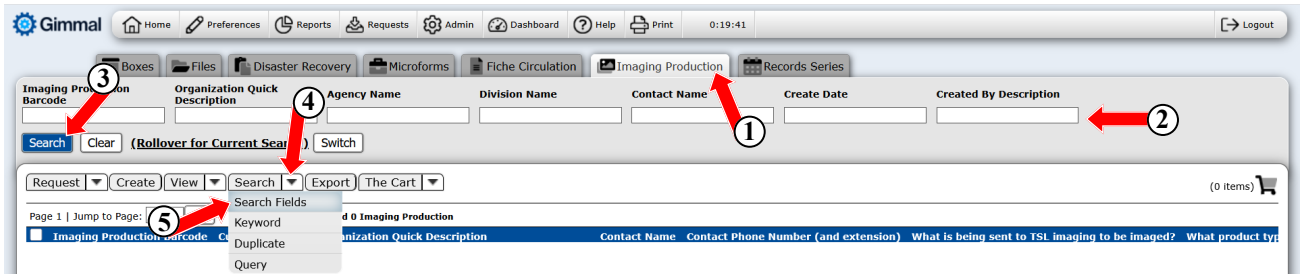
When the above message appears, it includes the Imaging Production Barcode that was generated for this Imaging Production. The barcode number is the unique identification number applied to each item created in Gimmal. Click once on **Ok**.
Then, if selected:

- **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****.*

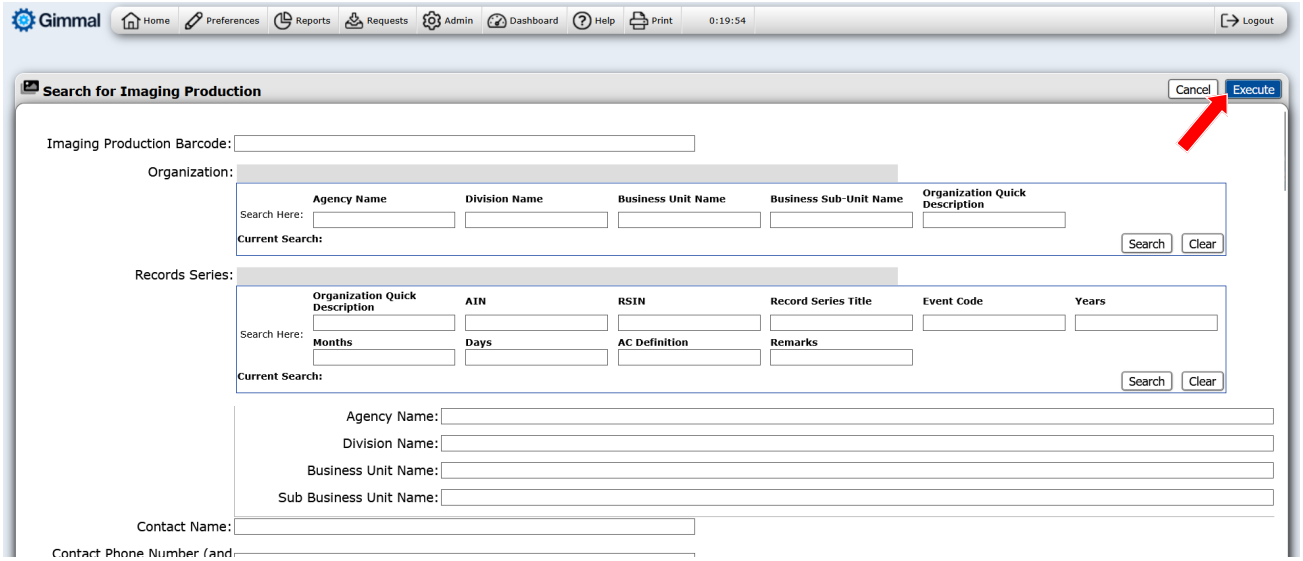
Request Pickup for Imaging Production Source Documents at the agency

After clicking Save & Close: Find Imaging Production for items at the agency



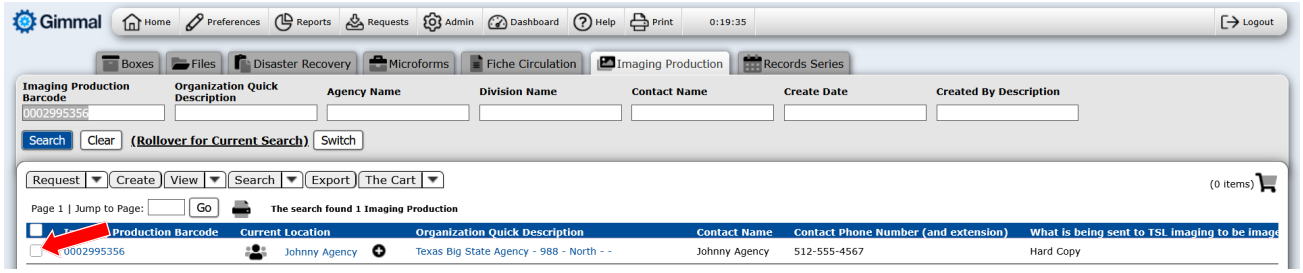
1. Click once on the item type tab for **Imaging Production**.
2. Enter search terms into any of the **Quick Search** fields to find the Imaging Production.
3. Click once on **Search** and if the needed result populates in the grid, continue to **Search results, select the item** (Page 159).
   OR
4. Click once on **Search**.
5. Click once on **Search Fields** and continue below.

Search for Imaging Production screen



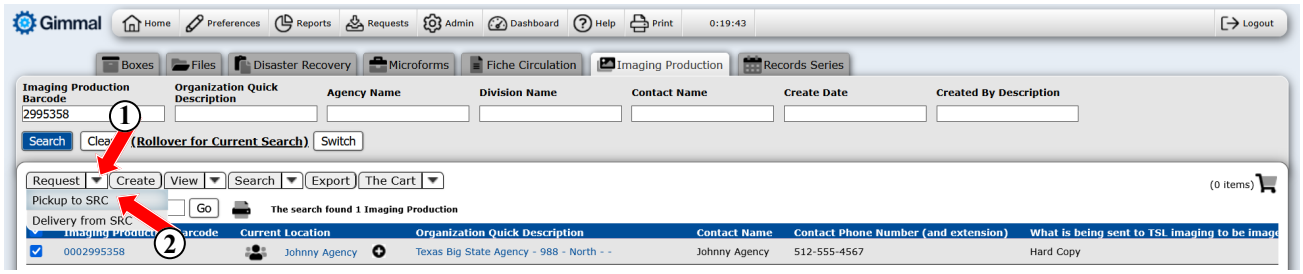
Enter search information into any fields (including the **Gimmal System Fields** on the bottom half of the screen) to find the Imaging Production needed to create a request pickup for items at the agency. Click once on **Execute**.

Search results, select the item



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



After clicking the checkbox for the Imaging Production item:

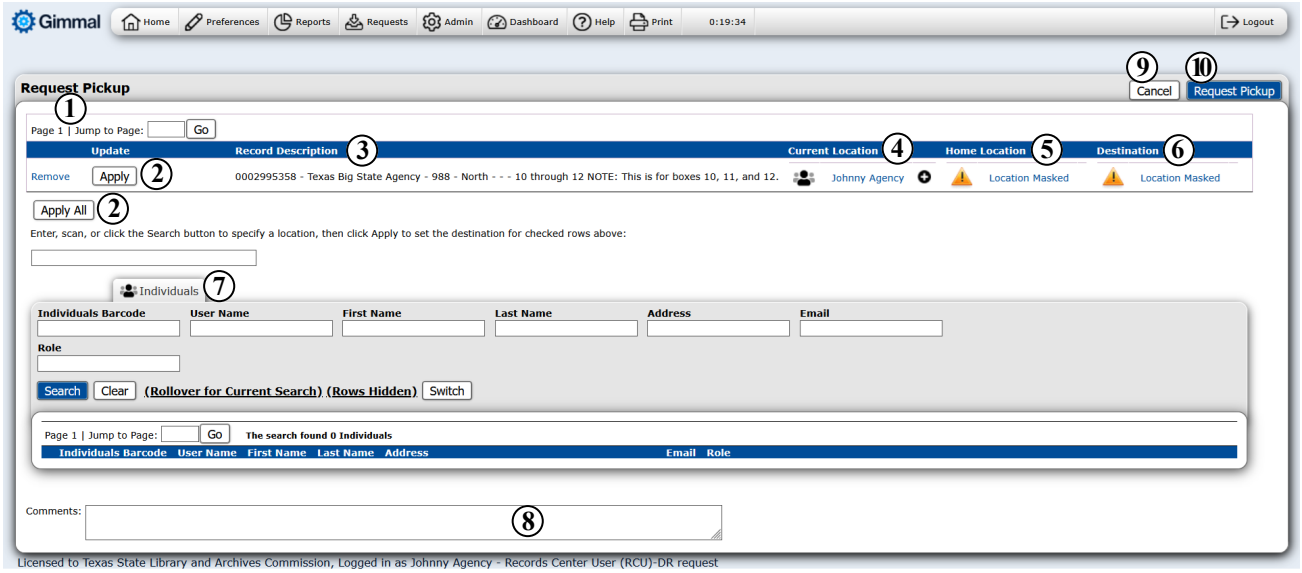
1. Click once on **Request.**
2. Click once on **Pickup to SRC** and turn to **Request Pickup** (Page 160).

After clicking Save & View: Select Pickup to SRC

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

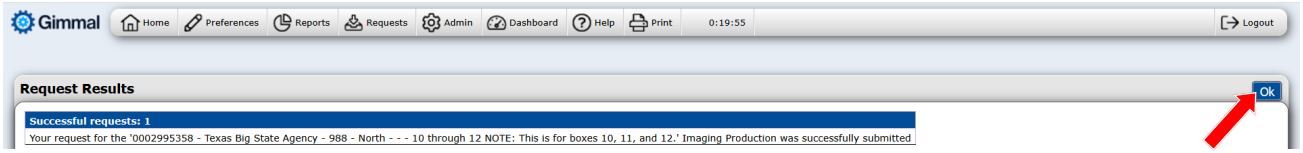


1. **Page Information:** This displays how many screen pages the requested pickup items appear. The maximum is 10 items per page. All items on all pages will be processed with this request.
2. **Change Destination:** APPLY buttons are not used. **Disregard these buttons.**
3. **Record Description:** 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.**
6. **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/slrm/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.

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.

NOTES

Supplemental Information: Gimmal 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 Gimmal, 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 Gimmal.
Boxes item type tab: The item type tab used for everything associated with boxes in Gimmal.
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 Gimmal. 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 Gimmal.

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 Gimmal 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 Gimmal.
Creating information dialogue box: This message appears when any item is created in Gimmal. 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 Gimmal 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.

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.

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 Gimmal.
Microforms: In Gimmal, 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 Gimmal.
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 Gimmal 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 Gimmal 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 Gimmal 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 Gimmal 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 Gimmal 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.

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 Gimmal.
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 Gimmal. These rights are under the control of a Gimmal administrator at the Texas State Library.
Role: Role permissions determine what the individual sees and does in Gimmal. 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 Gimmal 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 Gimmal are processed through the SRC or at the satellite facility in Southeast Austin.

Time Out: When a client is logged in to Gimmal 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 Gimmal 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 Gimmal.

View: Action Button to see an item on the tab or to see the History for the item.

NOTES

NOTES

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.

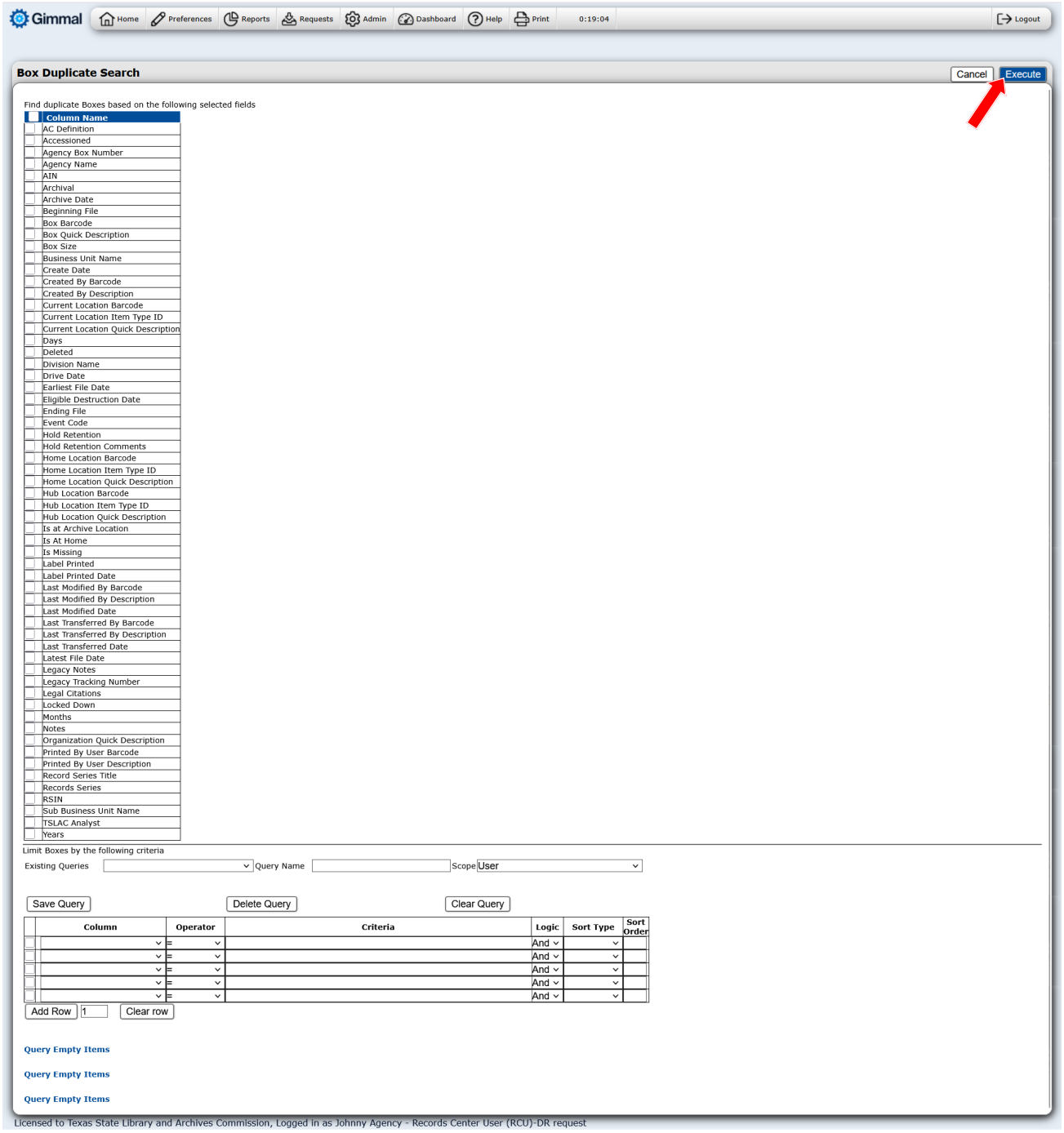
<> is used to search for a range or as an exception.
Examples: To find all containers numbered 500 to 775, enter: >=500<=775
<>12 in the Agency Box# field will search for all boxes not including 12 in that field.

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.

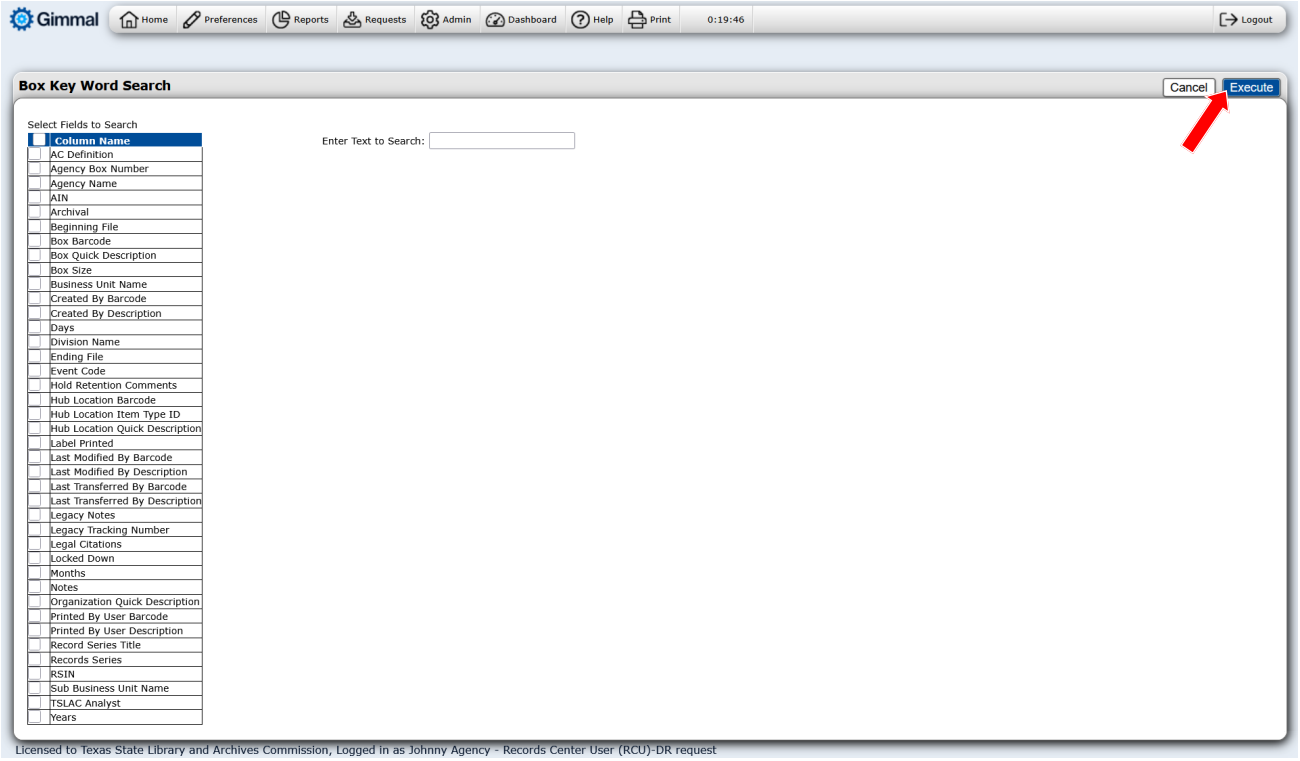


Select any number of checkboxes to the left of the field names. Use the Query section at the bottom to narrow the search even more. See the section about **Advanced Query Search** (Page 172) for more information. Click **Execute** at the top right to run the search.

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.*

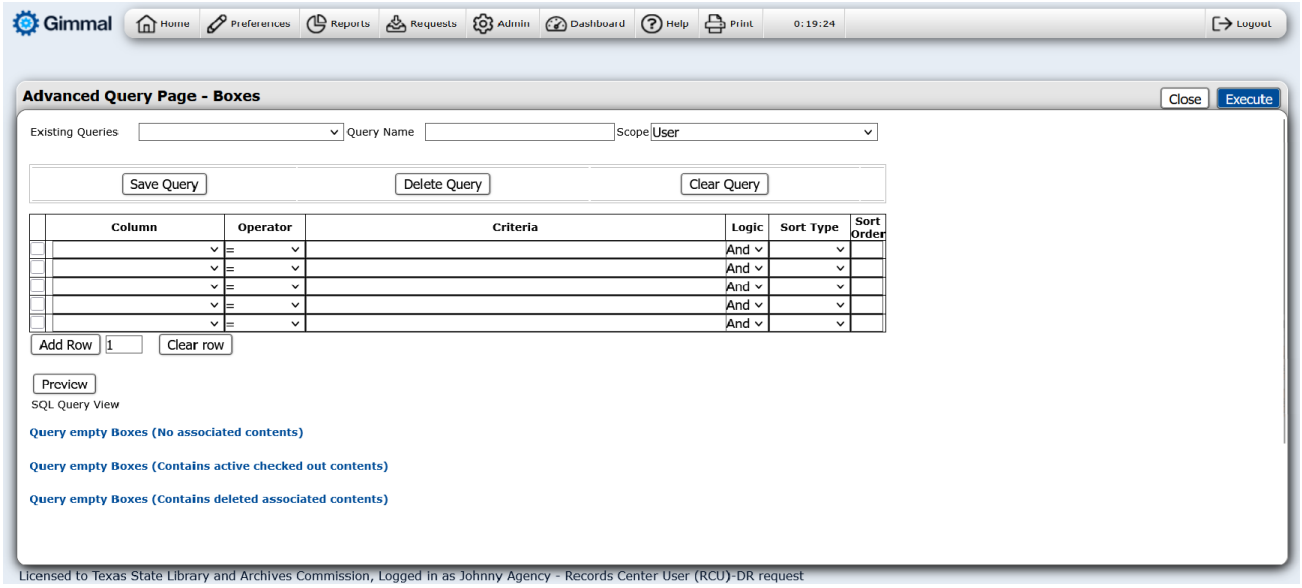
Key Word Search

Search using **Key Word Search** using the **Search** Action Button.



Click the checkbox(es) on the left the 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



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

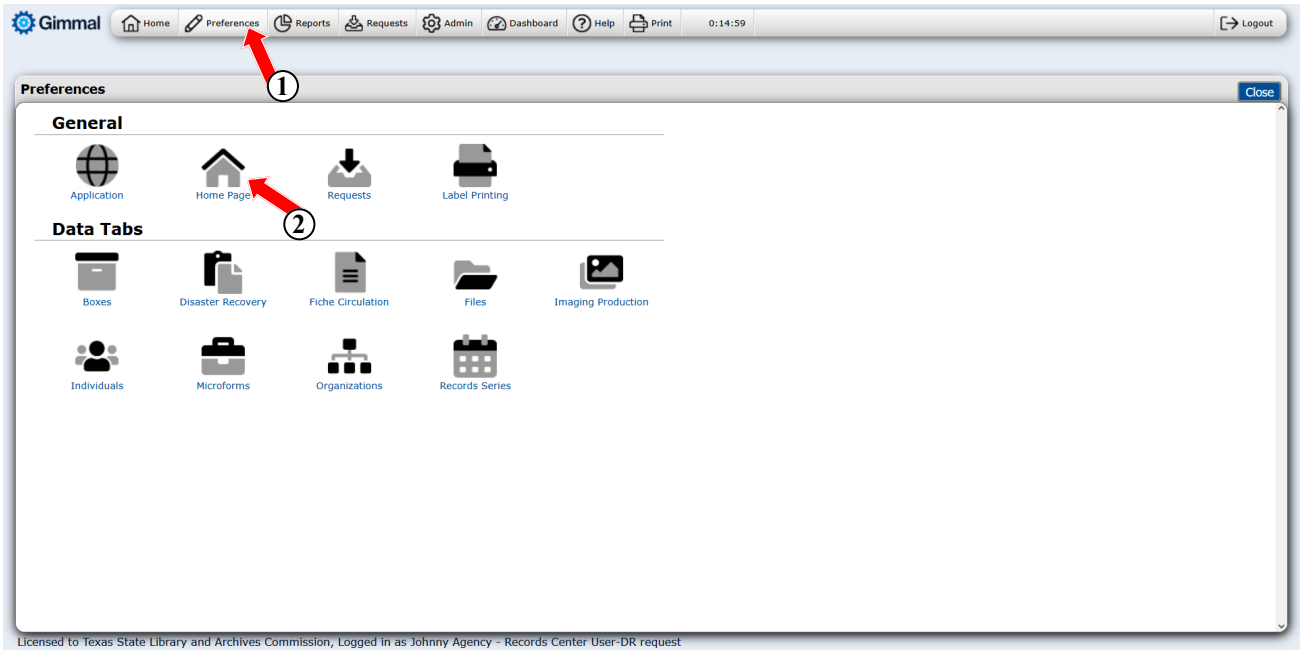
BOXYBIT *The three **Query Empty Items** that appear at the bottom of the Boxes screen are known by Gimmal as a non-working issue. Please disregard these options.*
Click **Execute** at the top right to run the search.

NOTES

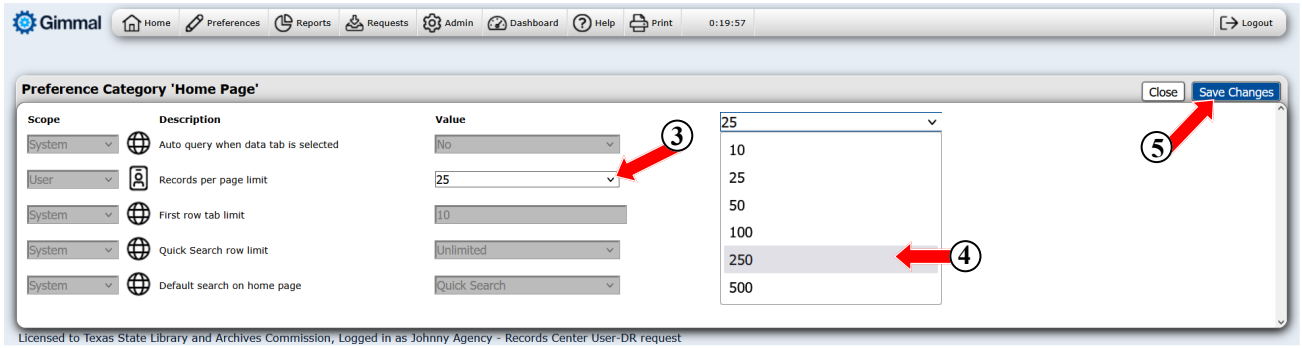
NOTES

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**.

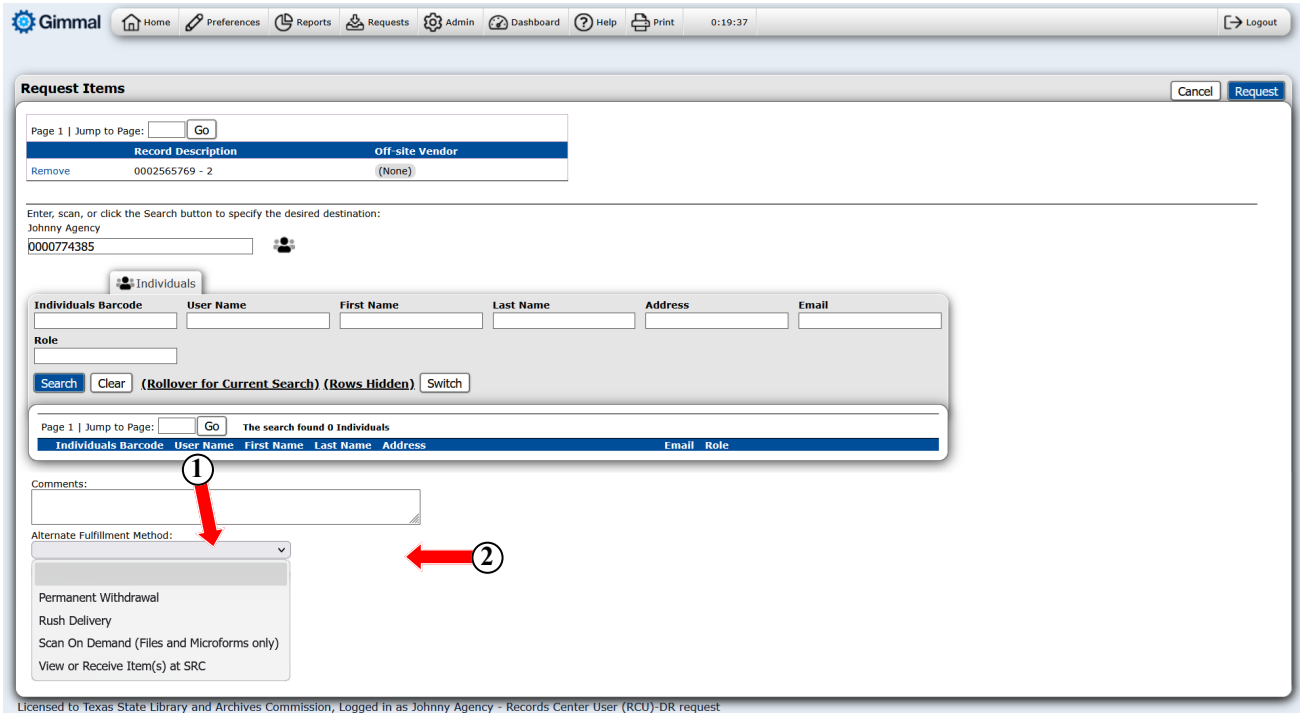


Edit the number that appears in the field for **Records per page limit**. Click once **(3)** on the down arrow. A preset group of numbers shows in the dropdown menu; in the menu, click once **(4)** on the new setting from the list, then click once **(5)** on **Save**. The number selected will be the 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.*

NOTES

Supplemental Information:
Alternate Fulfillment Method



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.

NOTES

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

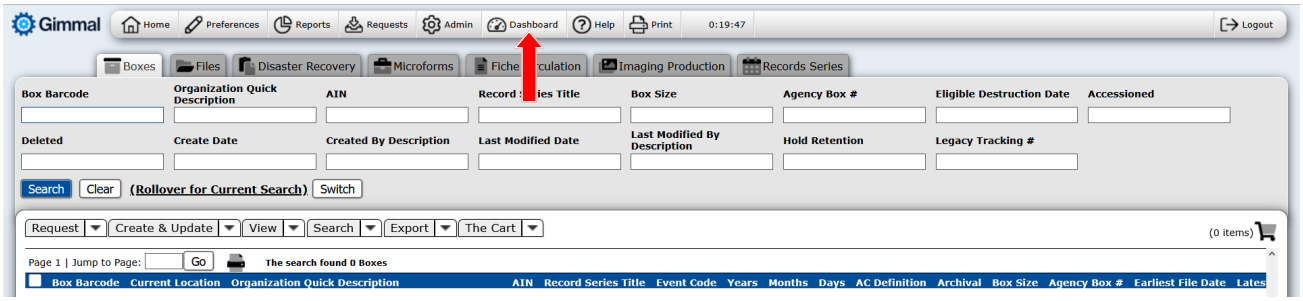
Look to the Event Code column** in Gimmal for the Record Series Title selected in the Records Series section to use the below chart to determine the Drive Date.

EVENT CODE column is	Drive Date
AC = **A**fter **C**lose **AC**	The Drive Date is the Close Date*** as defined in the AC Definition column.
CE = **C**alendar Year **E**nd **CE**	The Drive Date is December 31 of the Calendar Year for the Latest File Date. ***Example:*** *Latest File Date: 10/15/2024, Drive Date is 12/31/2024*
FE = **F**iscal Year **E**nd **FE**	The Drive Date is August 31 of the Fiscal Year for the Latest File Date. ***Examples:*** *Latest File Date: 10/15/2024, Drive Date is 08/31/2025* *Latest File Date: 03/31/2025, Drive Date is 08/31/2025*
Event Code is empty **N/A**	The Drive Date is the same as the Latest File Date.
PM = PER**M**ANENT **PM**	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 = **A**dministratively **V**aluable **AV**	The Drive Date is when the records are no longer administratively valuable unless identified as a later date on the Retention Schedule.
FFE = **F**ederal **F**iscal Year **E**nd **FFE**	The Drive Date is September 30 of the Federal Fiscal Year for the Latest File Date. ***Example:*** *Latest File Date is 12/15/2024, Drive Date is 09/30/2025*
LA = **L**ife of **A**sset **LA**	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 = **U**ntil **S**uperseded **US**	The Drive Date is when the item has been superseded unless identified as a later date on the Retention Schedule.

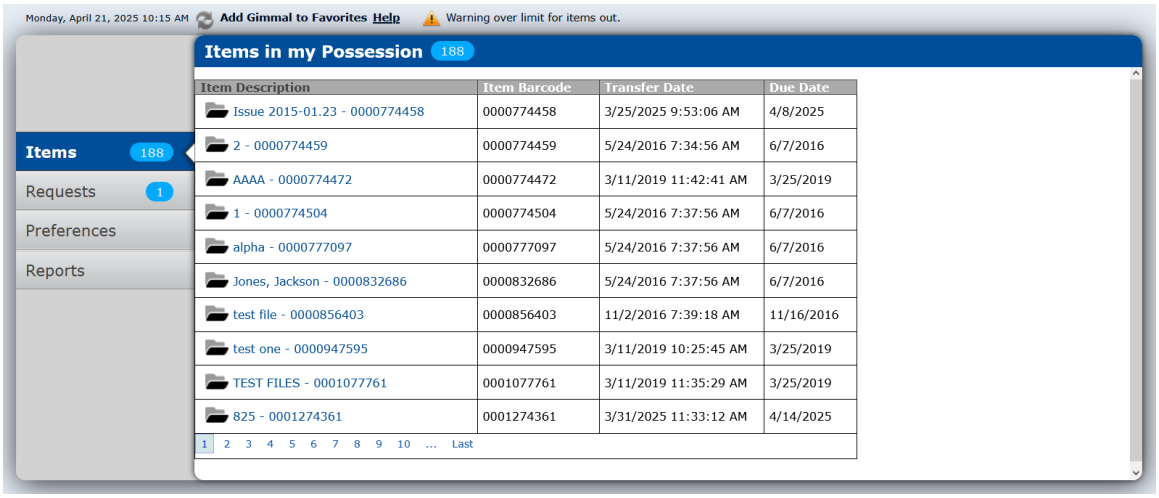
*The only time the Drive Date is the same as the Eligible Destruction Date is when no information is in Years, Months, and Days columns.
**On the printed Retention Schedule, the column is labeled Retention Code.
***Close Date is the date when records are deemed to be no longer active at your agency.

NOTES

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:

Boxes

Microforms (Microfilm / Microfiche)

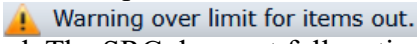
Files

Fiche Circulation

Disaster Recovery

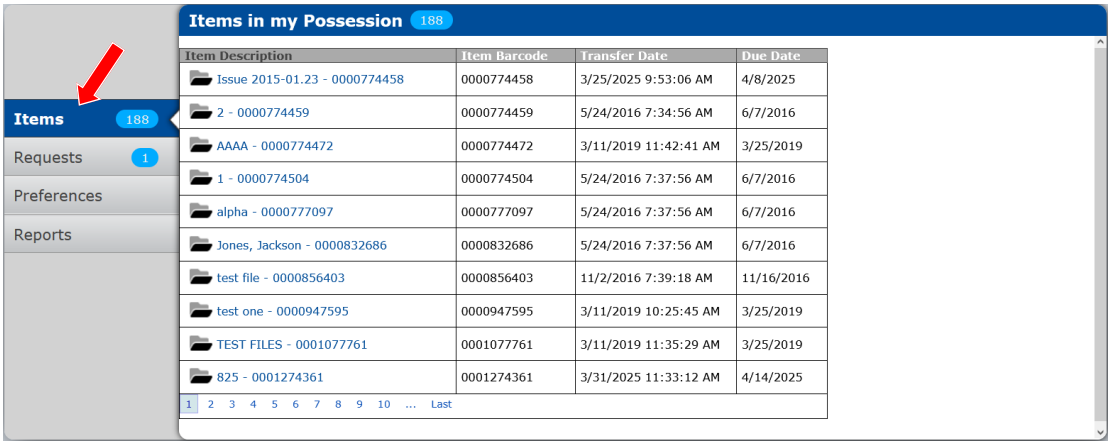
Imaging Production

Disregard this message if it is seen at the top of the screen:



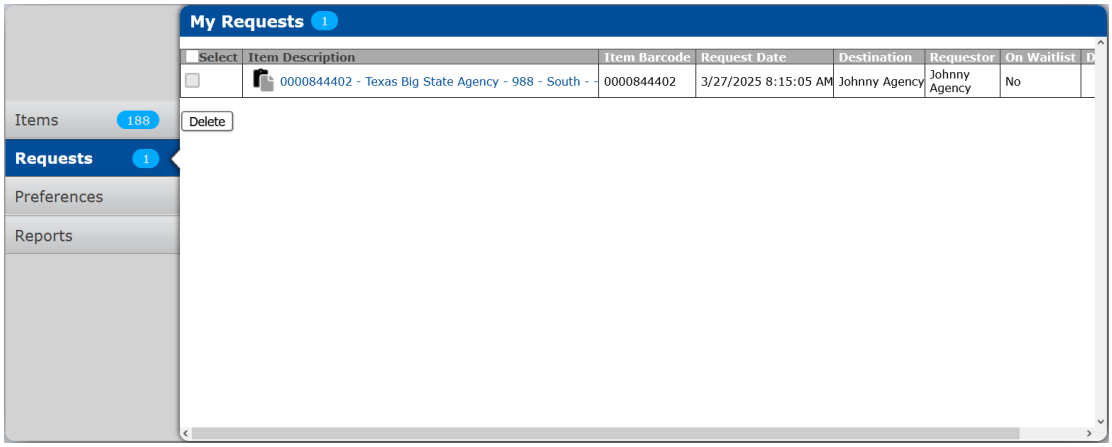
This pertains to a setting in Gimmal. The SRC does not follow time or quantity limits regulations.

Items in my Possession



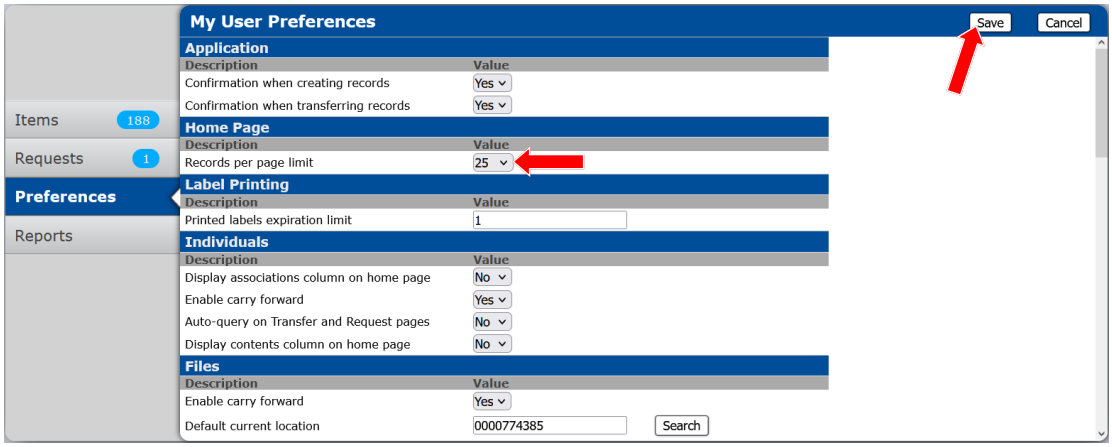
Click once on **Items** to see **Items in my Possession**. These items were delivered to the client from the SRC or have been created by the client in Gimmal and not yet received into the SRC. Anything on this list is assigned to the client in **Current Location.** The number on the tab is how many items are assigned to the client in Gimmal. Click the link text under **Item Description** to open the **View** screen for the item.

My Requests



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).

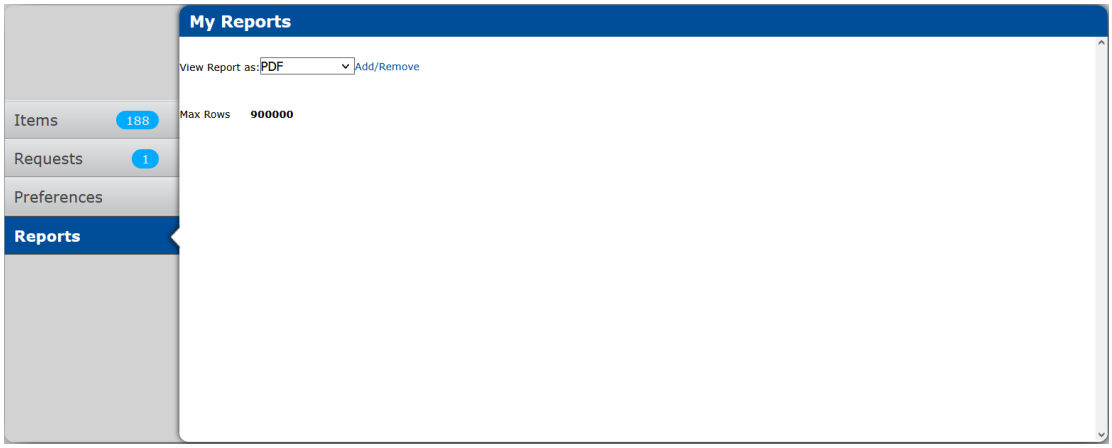
My User Preferences



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 Gimmal 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).

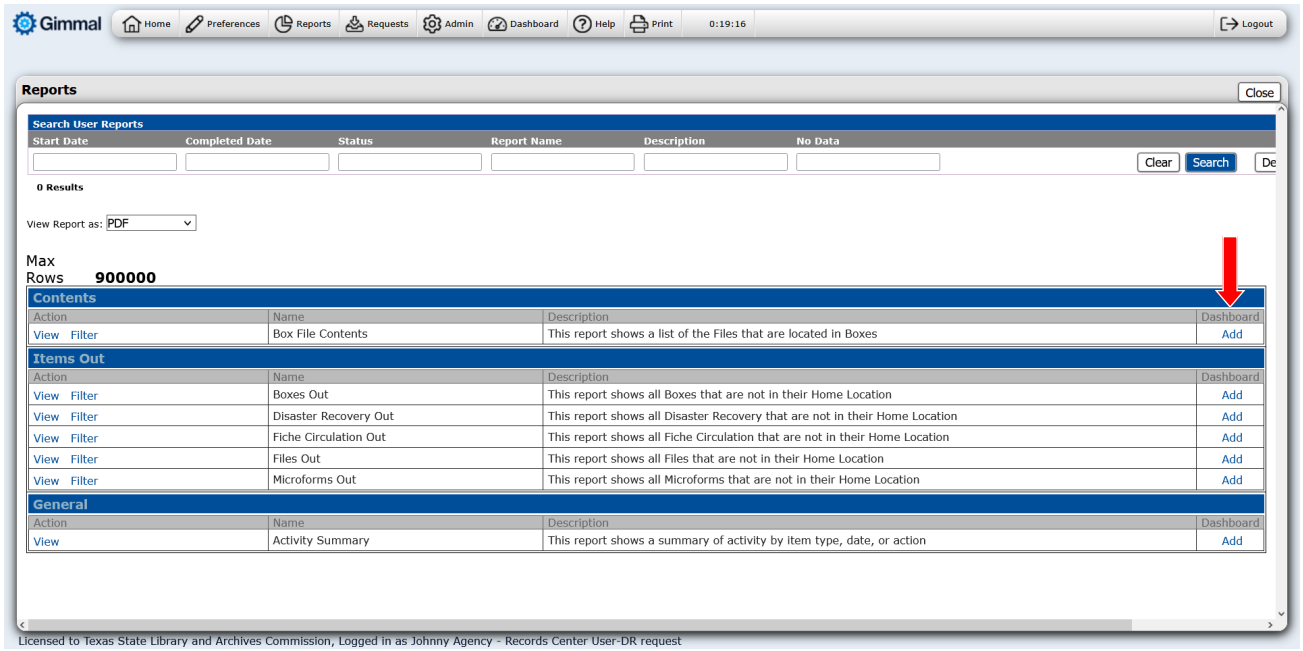
BOXYBIT *It is best not to make any other changes in the Preferences section of Dashboard. Changing any other data fields (**Default Current Location, Default Home Location, Default Request Destination**) on this screen may result in delivery / pickup problems. So, as a rule, please do not change any information on this screen other that the field **Records per page limit**.*

My Reports

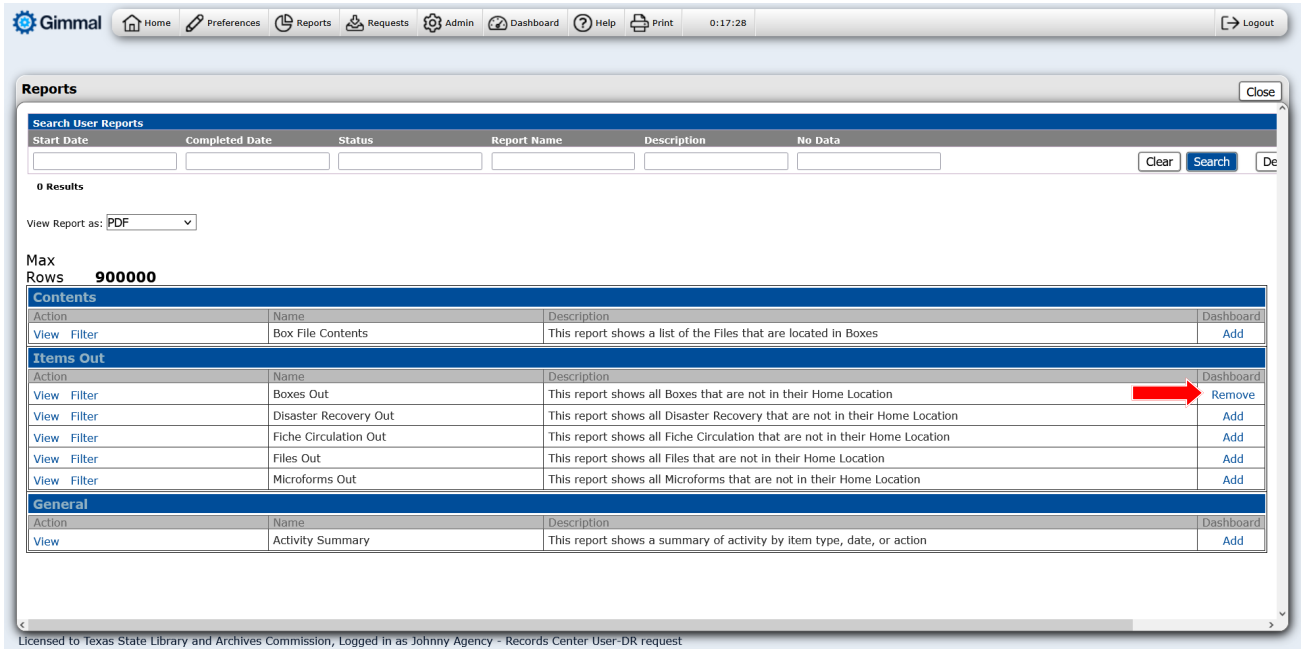


Reports that are run frequently can be added to this section. Click once on **Add/Remove**.

Reports

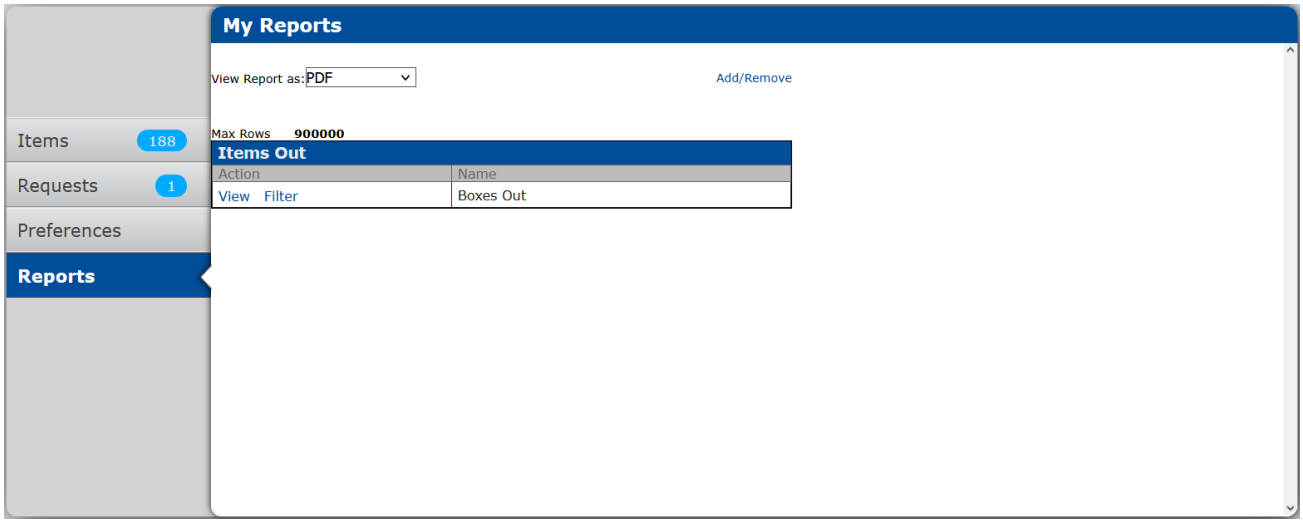


Click once on **Add** in the **Dashboard** column for any reports that need to be added to the Dashboard's Reports section. Another way to see and use Reports is to click Reports in the Navigation menu at the top of the screen.



When Reports are added to the Dashboard section, the **Dashboard** column will display as **Remove**.

Reports– With added report



This is how the **My Reports** section of Dashboard looks when a report is available.

NOTES

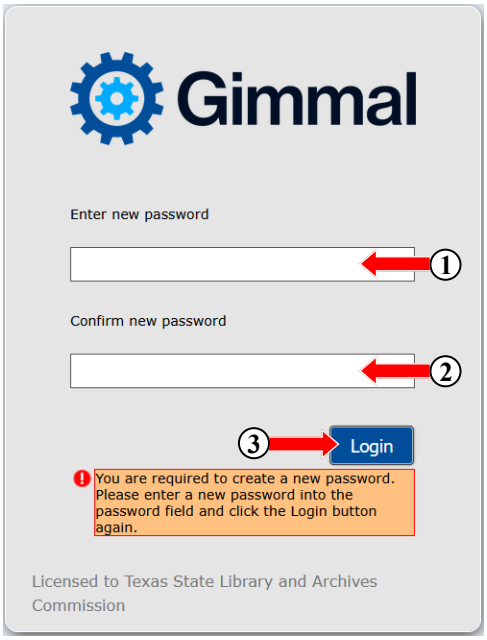
Supplemental Information: Change Gimmal Password

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 gimmal@tsl.texas.gov to request a password reset. Requests are not auto-replied. A Gimmal 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



Once every 90 days, the client is required to change the password. After logging in to Gimmal, the above screen will show.

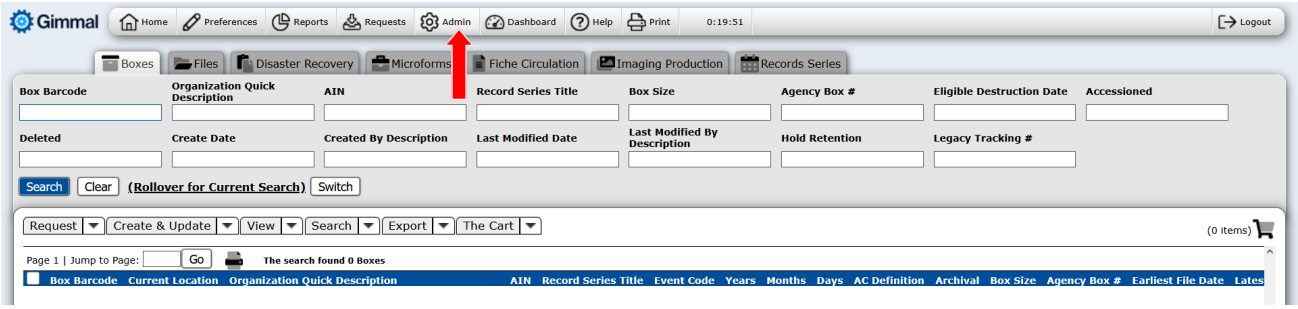
Password requirements are:
- Between 8 and 32 characters
- At least one number
- At least one uppercase letter
- At least one lowercase letter

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**.**

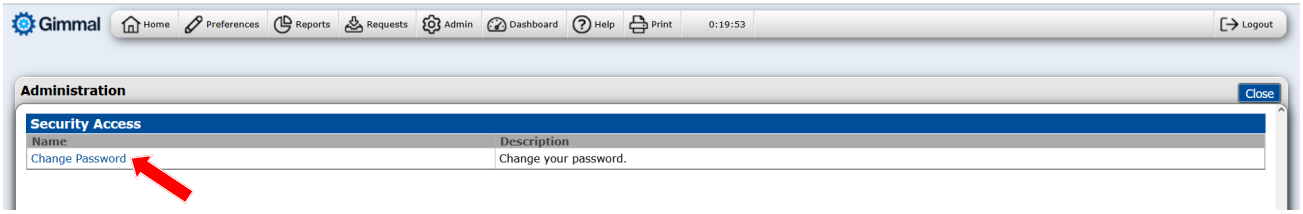
Remember the new password.

C. Reset the password before the required password change



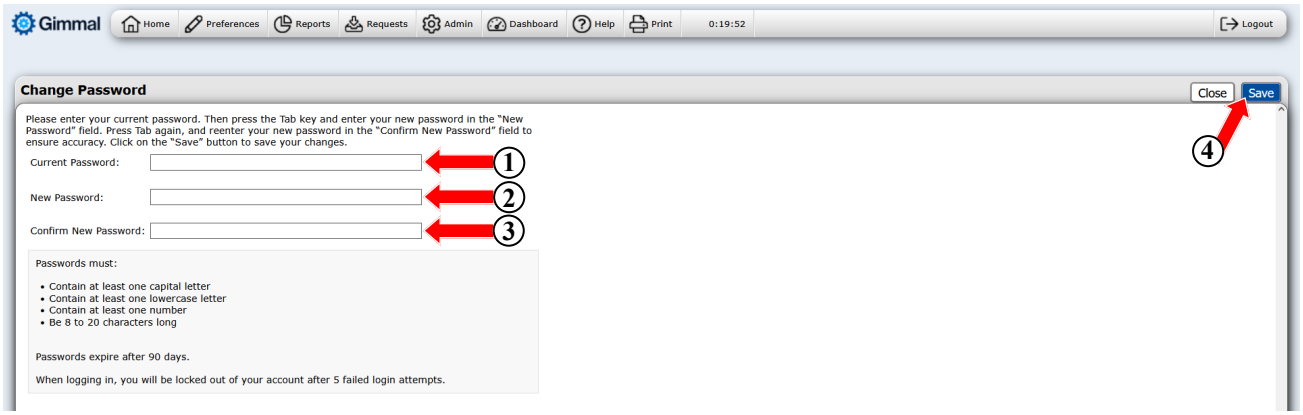
Gimmal requires clients to change their password on a regular schedule. However, if the password needs to be changed at any time, click once on **Admin** in Navigation Menu at the top of the screen.

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:

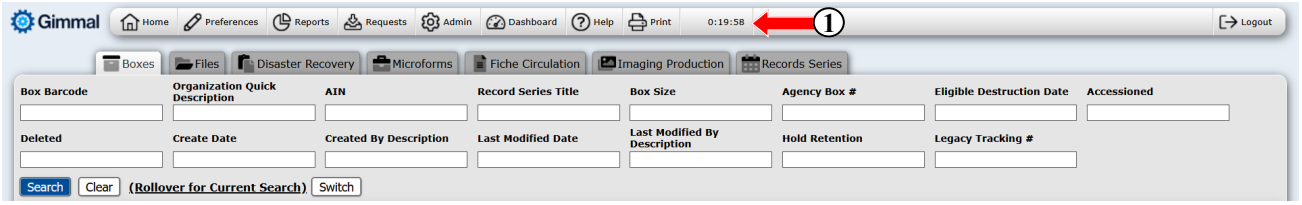
1. Enter the **Current Password**.
2. Enter the **New Password**.
3. Retype the new password to **Confirm New Password**.
4. Click once on **Save**. This process is complete.

Remember the new password.

NOTES

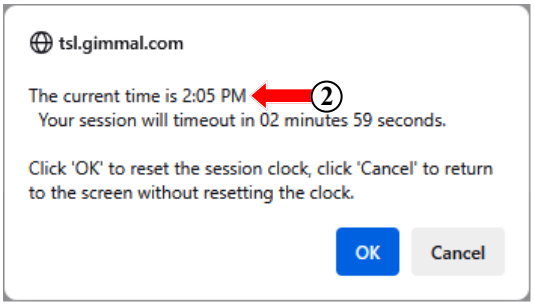
NOTES

Supplemental Information:
Timer



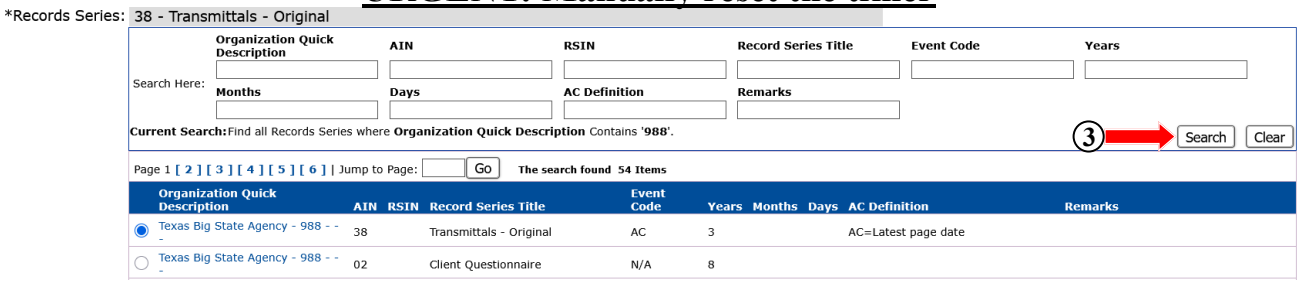
At the top of each Gimmal screen is a timer **(1)** that tells how much time is left before timing out.

Timeout warning



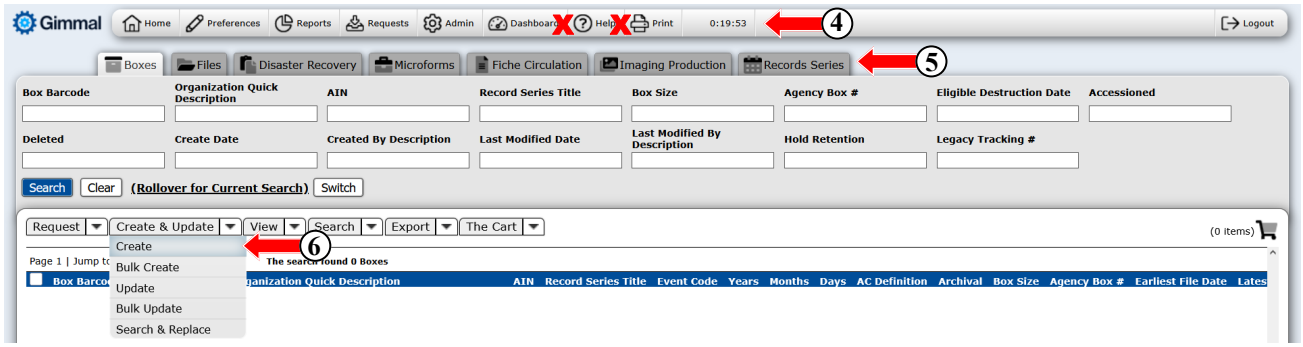
A reminder pop-up message appears when there is a remaining time of 3 minutes in the session before timing out. The "current time" **(2)** is when the warning posted.

URGENT: Manually reset the timer



Sometimes, timeout might occur without notification. Getting timed out doesn't always happen but sometimes, it does. Work efficiently, but <u>be prepared</u>. There is a way to reset the timer before getting a timeout warning: Click once **(3)** on **Search** in the Records Series section.

BOXYBIT *<u>Do not click a radio button in the Organization section to reset the timer</u>, 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.

NOTES

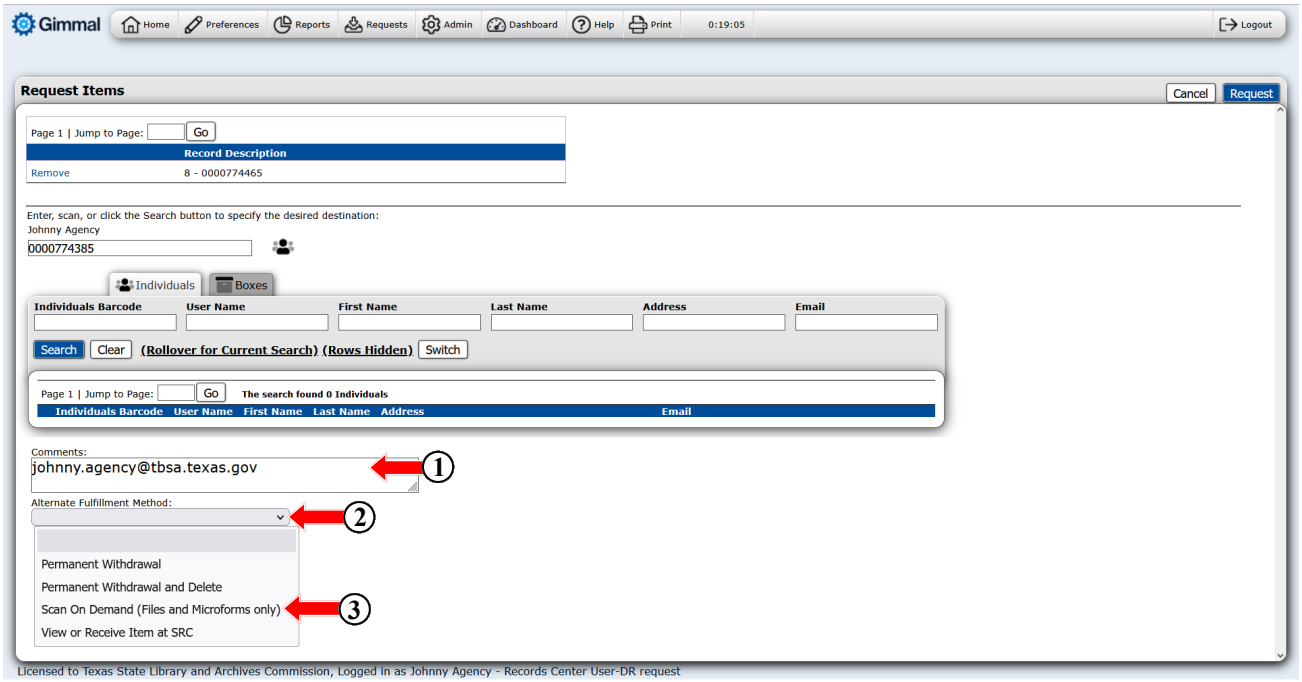
Supplemental Information:
Scan On Demand for Delivery

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 Alternative 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).



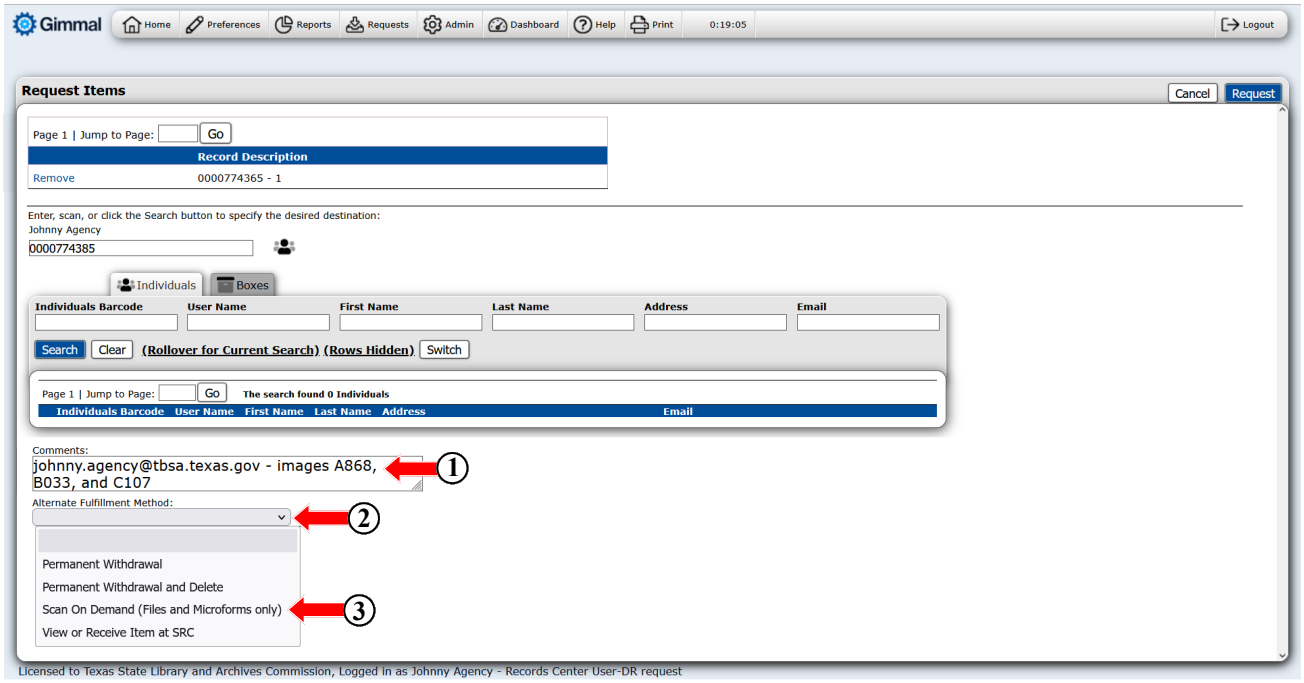
In the **Comments** field **(1)**, type the **work email address** where the scanned file will be sent. Scans cannot be sent to a personal email address like Yahoo or Gmail.

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/slrm/storage**
To cancel any Request or for more information, call the SRC Circulation Desk: 512-475-5155.

Scan On Demand: Microfilm Image(s)



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.

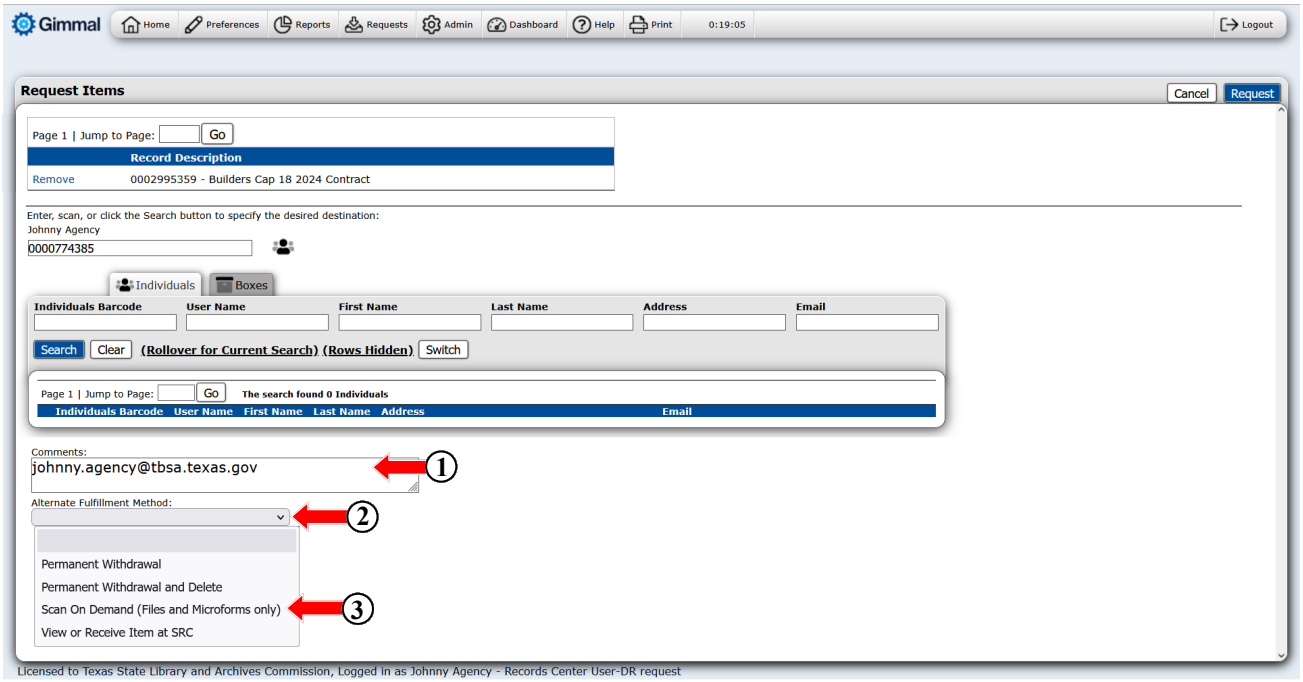
Click once **(2)** on the **Alternate Fulfillment Method** dropdown menu. Click once **(3)** on **Scan On Demand (Files and Microforms only)**.

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/slrm/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.



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/slrm/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.

NOTES

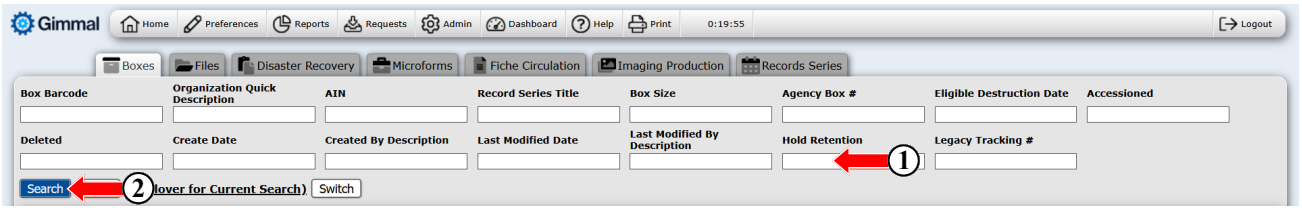
Supplemental Information:
Hold

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

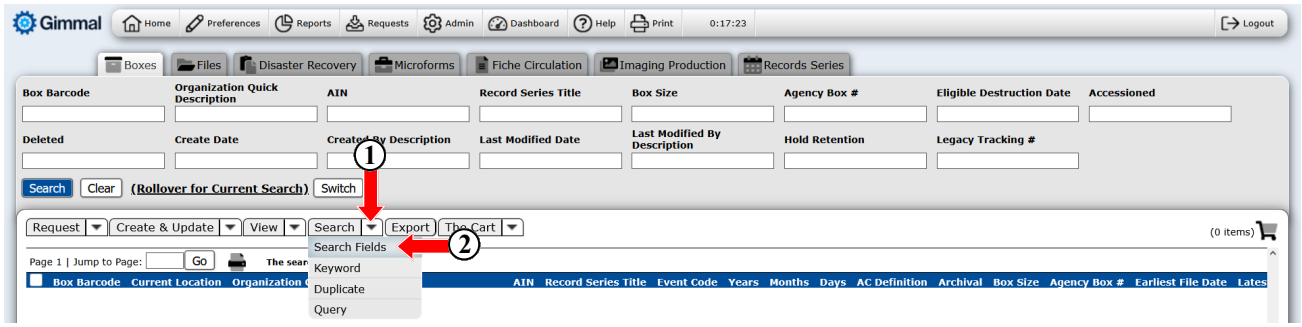


To do this from the home page (or to use the Search screen, turn to Page 198):

- **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).

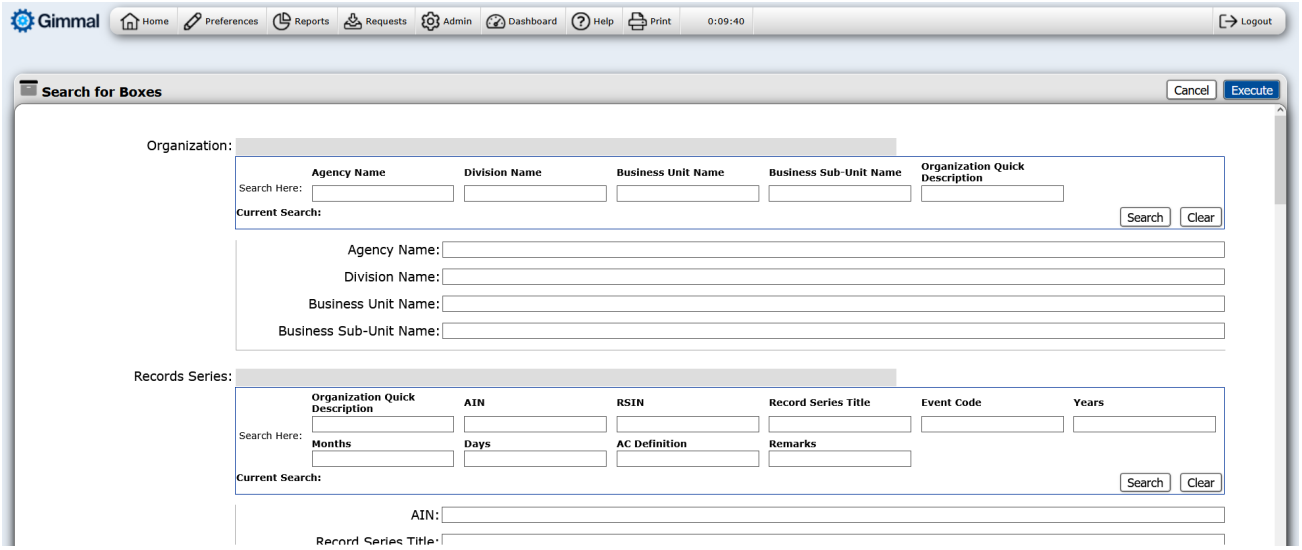
The reason true or false is used because when an item is placed on hold, there is a checkbox for Hold Retention that automatically gets selected when the items is updated (it is seen on the View screen for Boxes and Microforms). Since data is required to be entered into the quick search field for Hold Retention, true means the checkbox is selected, false means the checkbox is not selected.

Review items on hold: Use Search menu

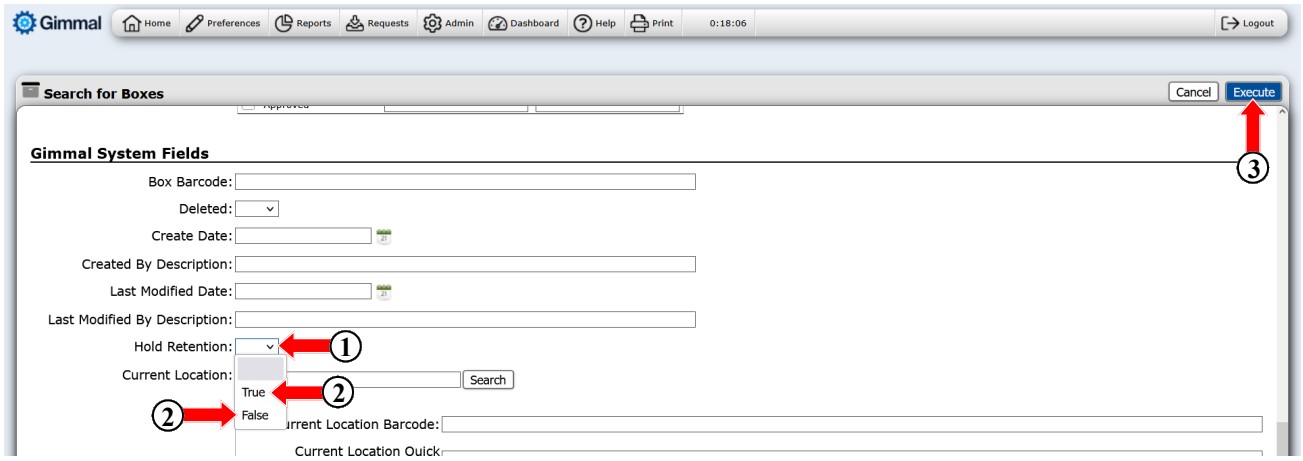


Click once **(1)** on **Search** dropdown menu the click once **(2)** on **Search Fields**.

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...

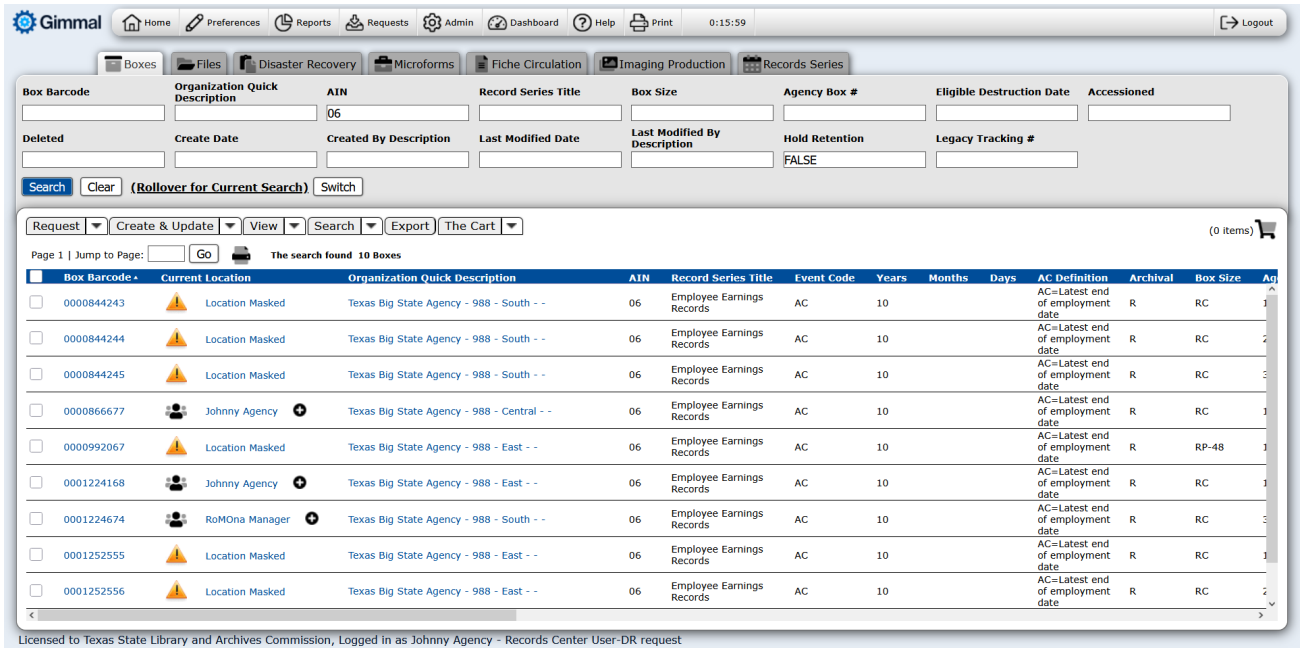


...the field for **Hold Retention** must be completed to find items that are on hold. On the View screen, this field is found in the Gimmal System Fields section and it appears as a checkbox. The selected checkbox means a hold type has been selected, an unselected checkbox means no hold type has been 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).

Search results for items not on hold



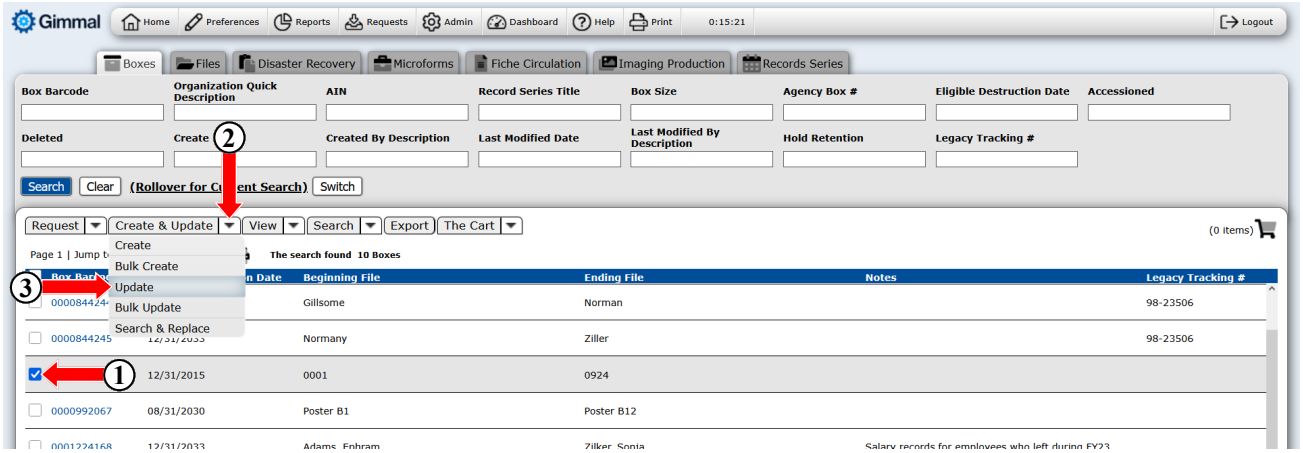
Regardless of the Search method used on either Page 197 or Page 198, search results populate the home page grid (above illustration).

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.

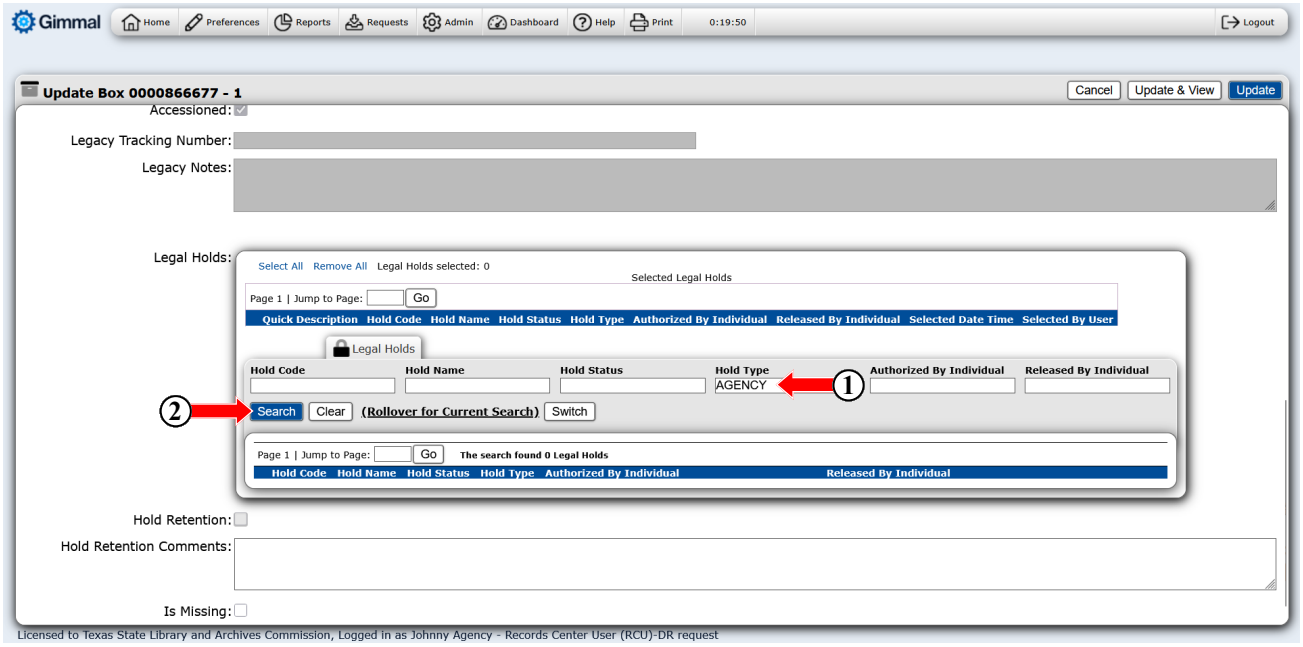
For multiple items, go to **Place multiple items on hold: Some or all?** (Page 202).

Place a single item on hold



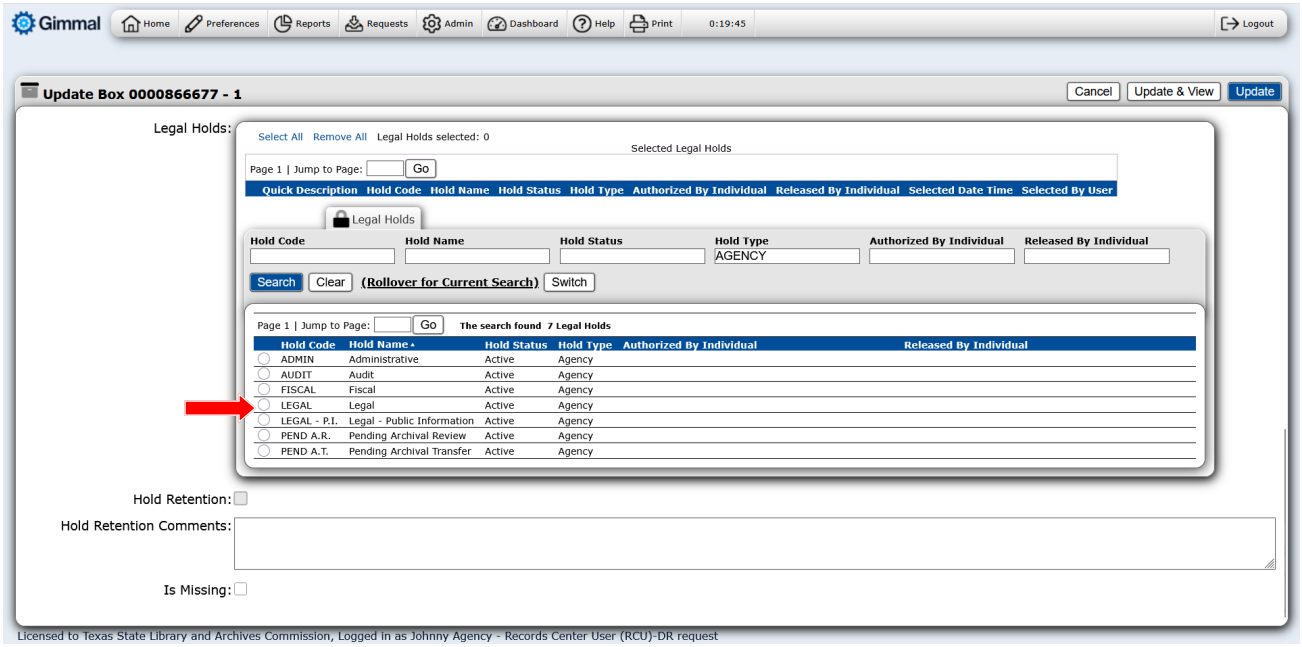
It has been determined that the only box to place on hold is the one eligible for destruction. Click once on the checkbox **(1)** for the item to be updated, click once **(2)** on **Create and Update**, then click once **(3)** on **Update**.

Place a single item on hold: Update Box screen



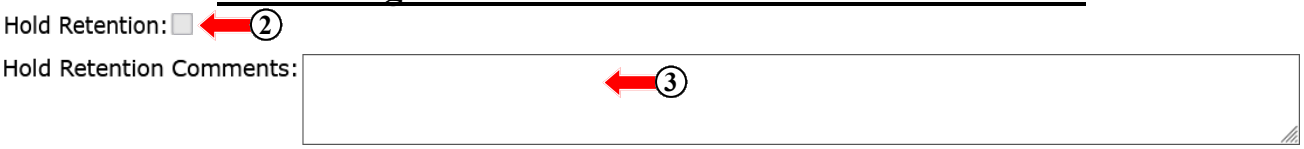
Scroll down to the **Legal Hold** section. Click once **(1)** into the **Hold Type** field and type **AGENCY**. Then click once **(2)** on Search.

Place a single item on hold: Select the hold name



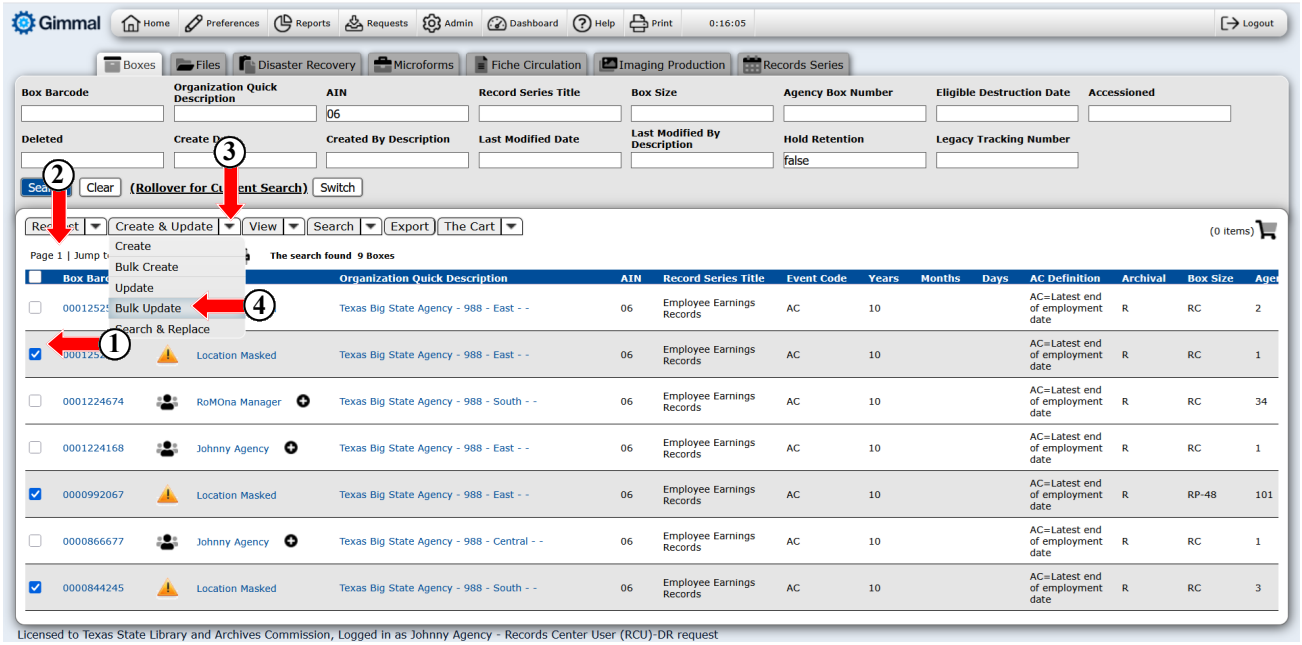
Click once on the radio button **(1)** for any one **Hold Name**. These hold types are open for interpretation based on the agency's understanding and use of these terms. **Select only one.**

Place a single item on hold: Hold Retention Comments



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.

Place multiple items on hold: Some or all?

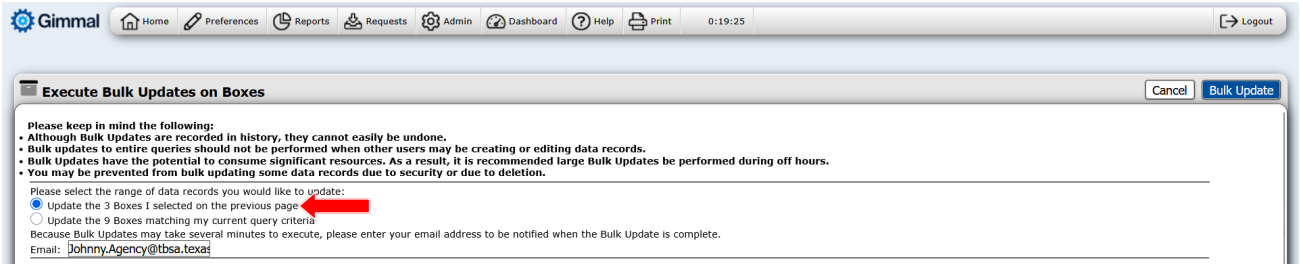


Update Some: If some items found are to be placed on hold, click once on the checkboxes on the left side of the grid **(1)**. If items appear on multiple pages **(2)** turn to ***Supplemental Information: Preferences: Number of items on home page*** (Page 175) to update the home page grid so all items 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).

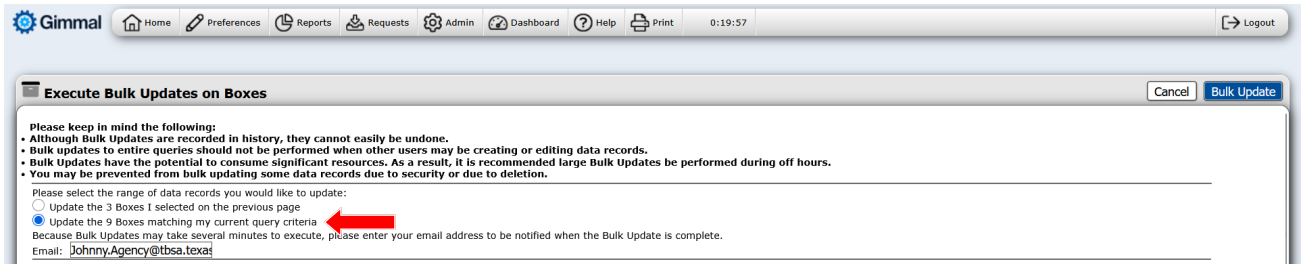
Update All: If all items found are to be placed on hold, do not select any of the checkboxes on the left side of the grid. Click once **(3)** on **Create & Update**, then click once **(4)** on **Bulk Update**. Continue to **Update All** (Page 203).

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:

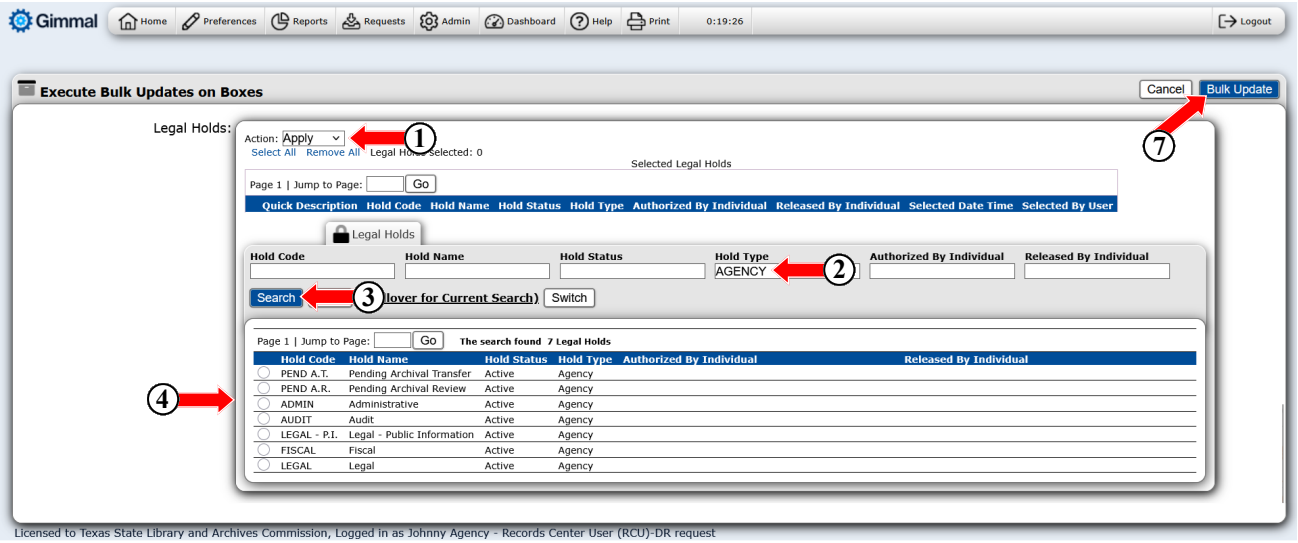


UPDATE ALL: Since no checkboxes were selected on the home page grid, the second radio button is selected for the total number of boxes in the search results:



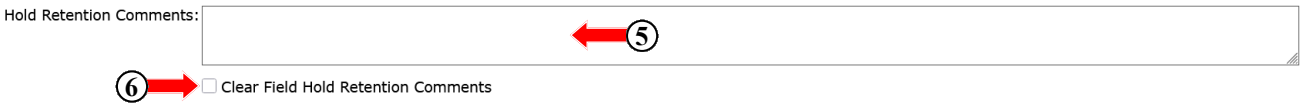
Place multiple items on hold: Select the hold name

Scroll down the page to the **Legal Holds** section:



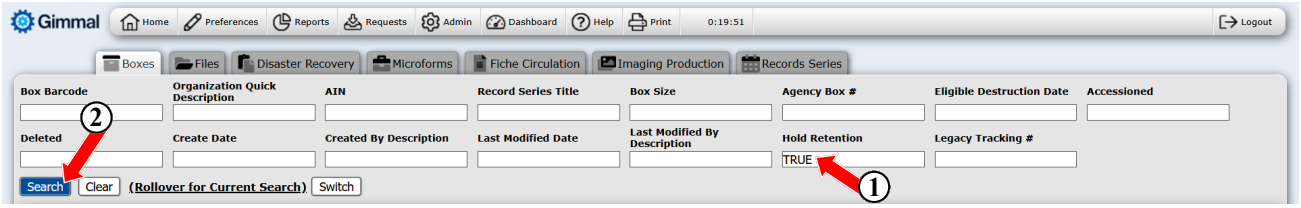
Do not click **(1)** the **Action:** dropdown menu. **Apply** is the correct option. Click once **(2)** into the **Hold Type** field and type **AGENCY**. Then click once **(3)** on Search.

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.**



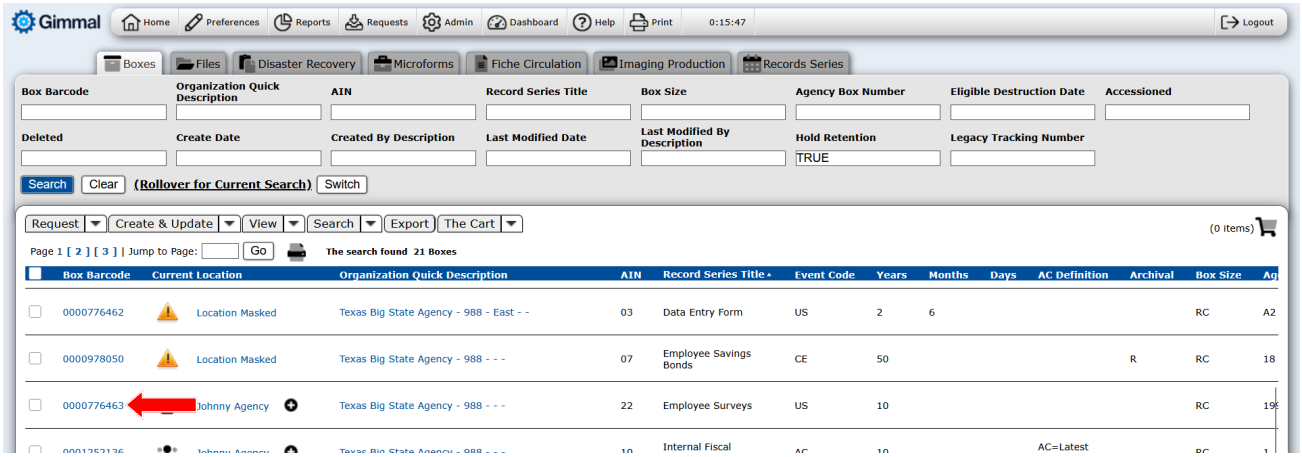
An optional field to complete **(5)** is **Hold Retention Comments** to explain why the items are on hold. Do not click the checkbox **(6)** for **Clear Field Hold Retention** Comments. This option is used when removing a hold type during bulk update. Once all information is complete, click once **(7)** on **Bulk Update**. This ends the process to assign a hold to a group of items. An email will be received when Gimmal completes the updates.

Remove hold: Search for items on hold



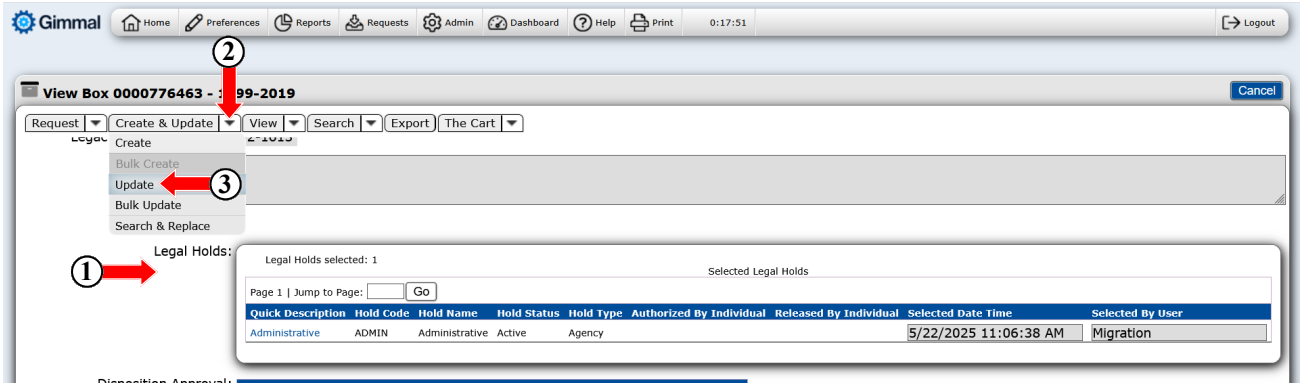
To find all items on hold, type **true** in the **Hold Retention** quick search field **(1)**. Other search fields can be completed to make the search more for specific. Click once on the **Search** button **(2)** when the fields are complete. Continue below to review and remove hold for one item. For 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



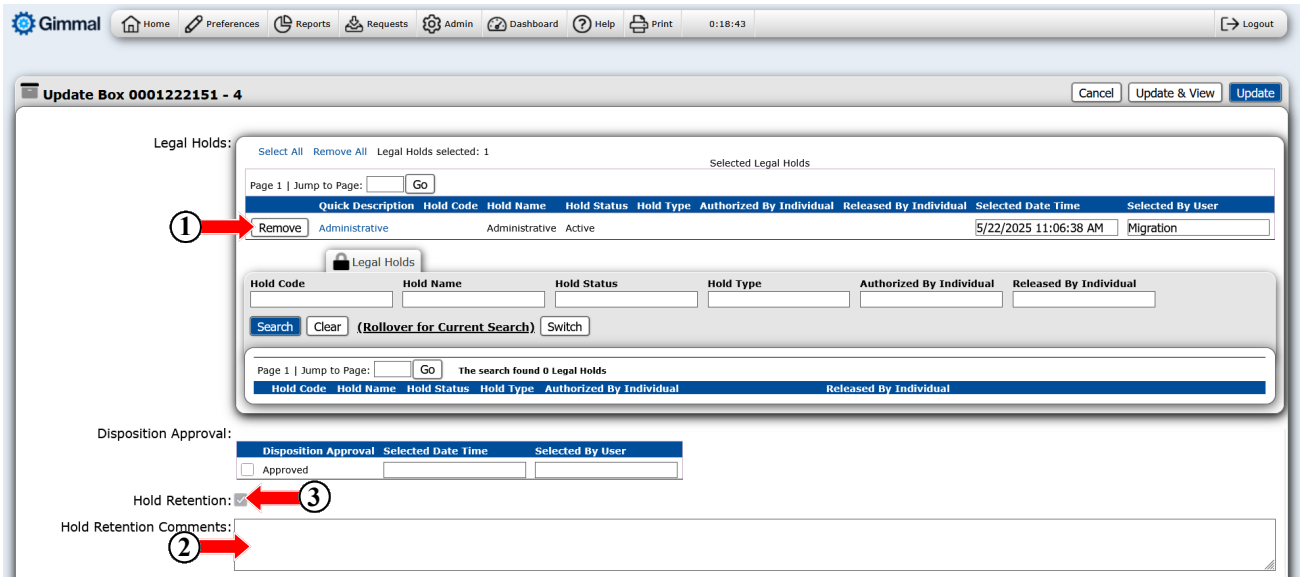
To review the hold placed on an item, click once on the item's barcode to go to the View Box screen.

Remove hold for one item: Update



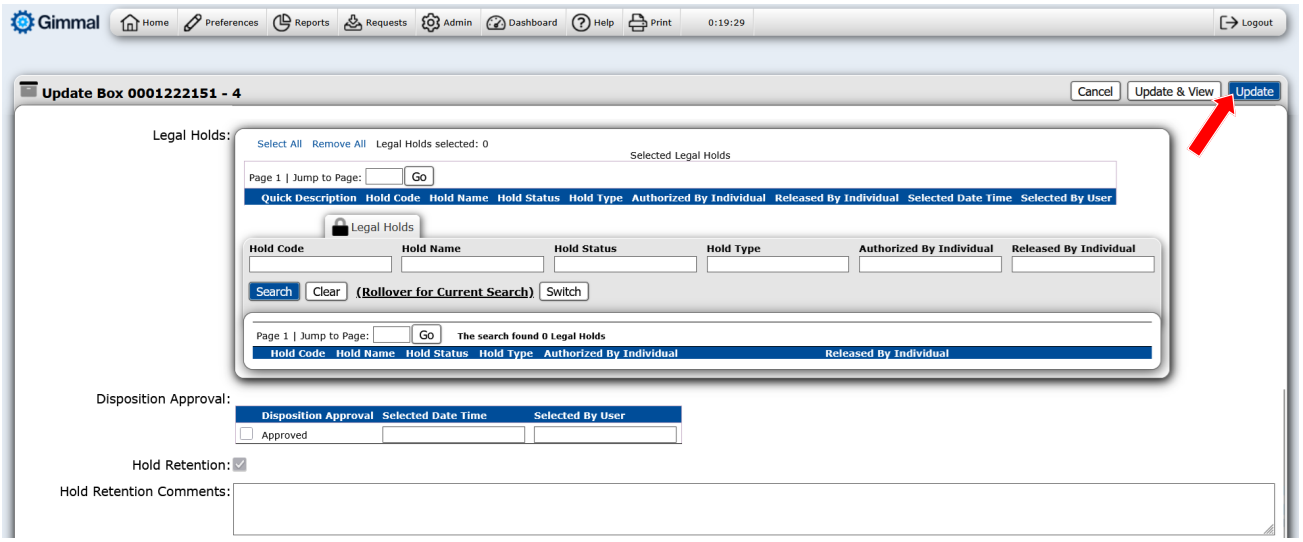
On the View Box screen, scroll down **(1)** to the **Legal Holds** section to see the hold placed on the item. To remove the hold, click once **(2)** on **Create & Update** dropdown menu, click once **(3)** on **Update**.

Remove hold for one item: Edit field(s)



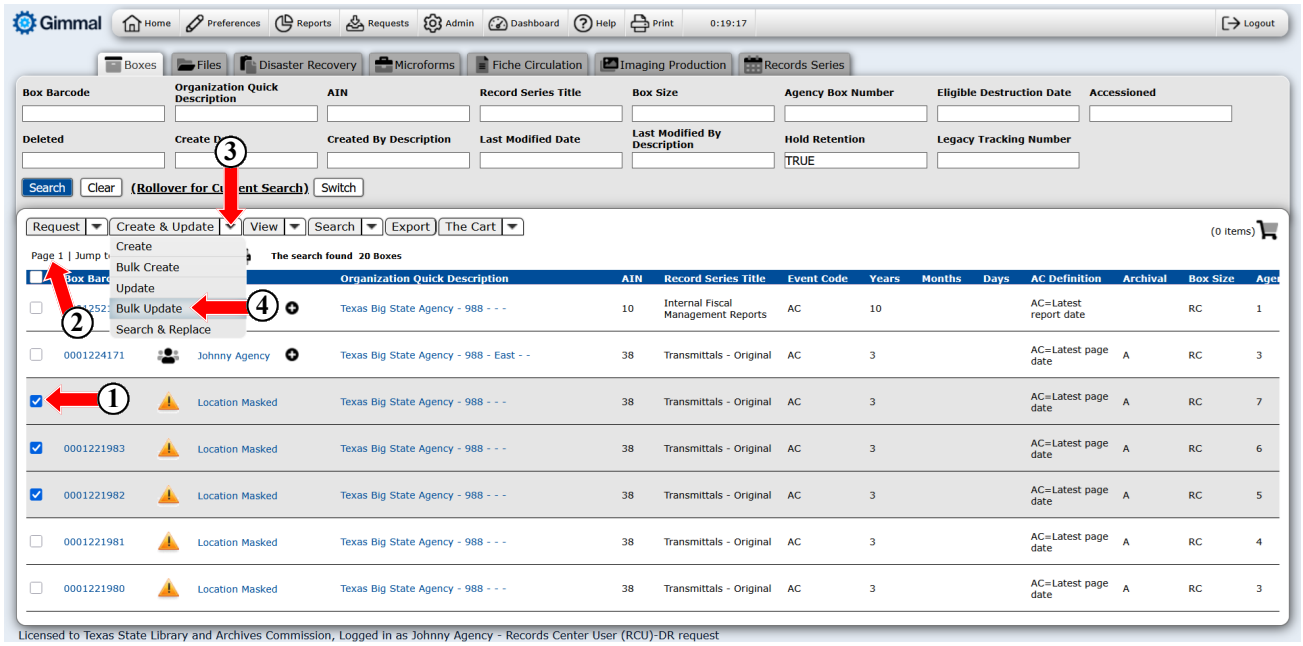
Scroll down the Update page to the **Legal Holds** section. Click once **(1)** on the **Remove** button for the selected hold type. Next, if information appears in the **Hold Retention Comments** field **(2)**, delete the information. Gimmal will automatically deselect **(3)** the **Hold Retention** checkbox when this page is updated.

Remove hold for one item: Click Update



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.

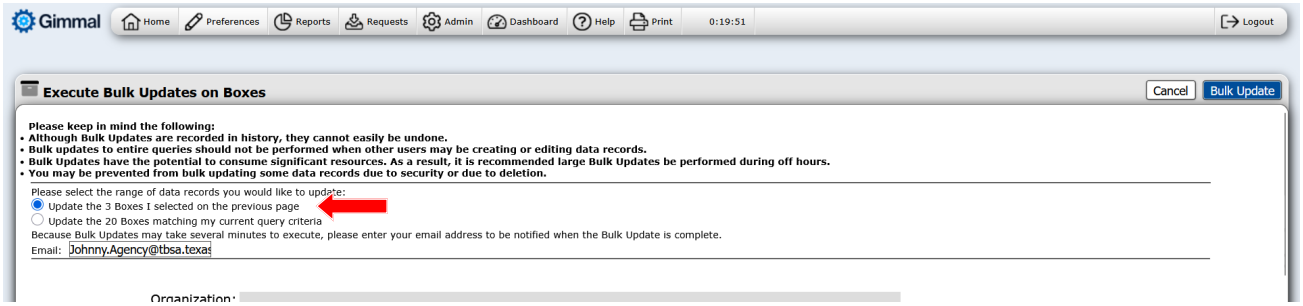
Remove hold for multiple items: Update some or update all



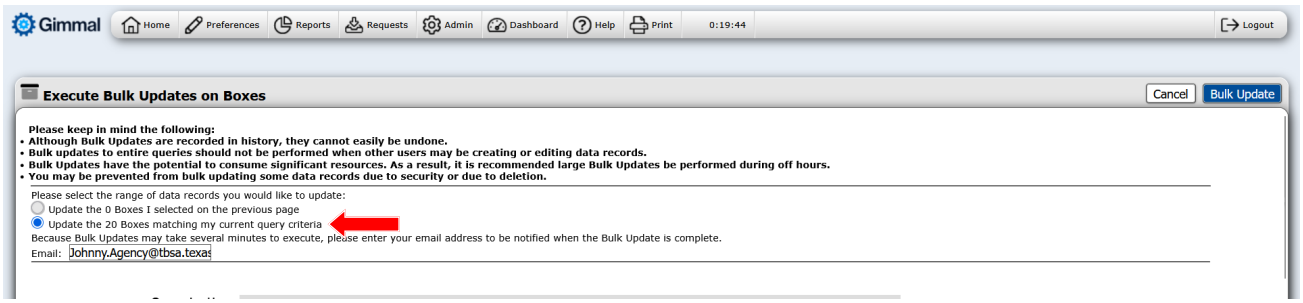
Update Some: If hold is to be removed on some items, click once on checkboxes on the left side of the grid **(1)**. If items are on multiple pages **(2)** turn to ***Supplemental Information: Preferences: Number of items on home page*** (Page 175) to update the home page so all items appear on a single 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?

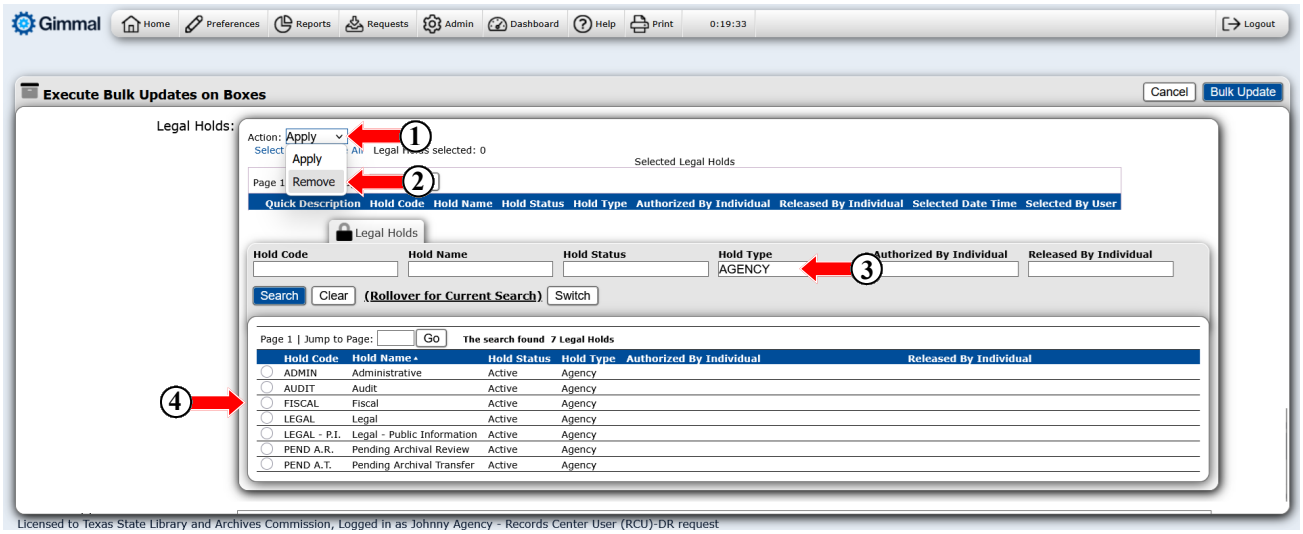


UPDATE SOME: Since some checkboxes were selected on the home page grid, the first radio button is selected for the total number of boxes selected in the search results.



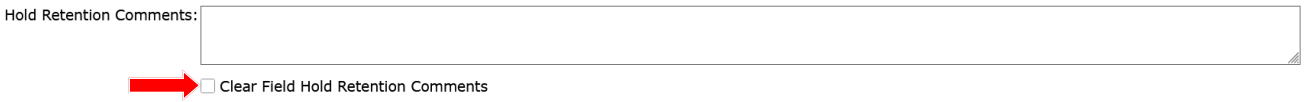
UPDATE ALL: Since no checkboxes were selected on the home page grid, the second radio button is selected for the total number of boxes in the search results.

Remove hold for multiple items: Edit information



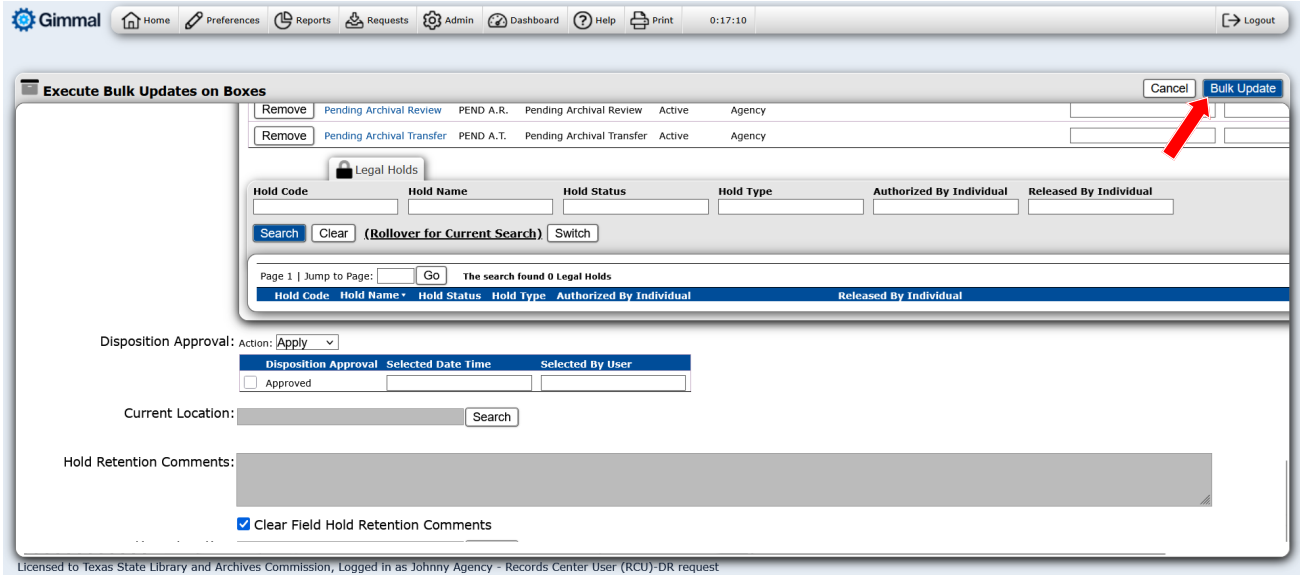
Click once **(1)** on **Action:** dropdown menu and select **Remove**. In the **Hold Status** field **(2)**, type **AGENCY** and click **Search** to show all of the different hold types. **Click each of the seven radio buttons to remove any hold type for the items that were selected.**

Remove hold for multiple items: Remove Hold Retention Comments



Hold Retention Comments 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



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.

NOTES

NOTES

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).

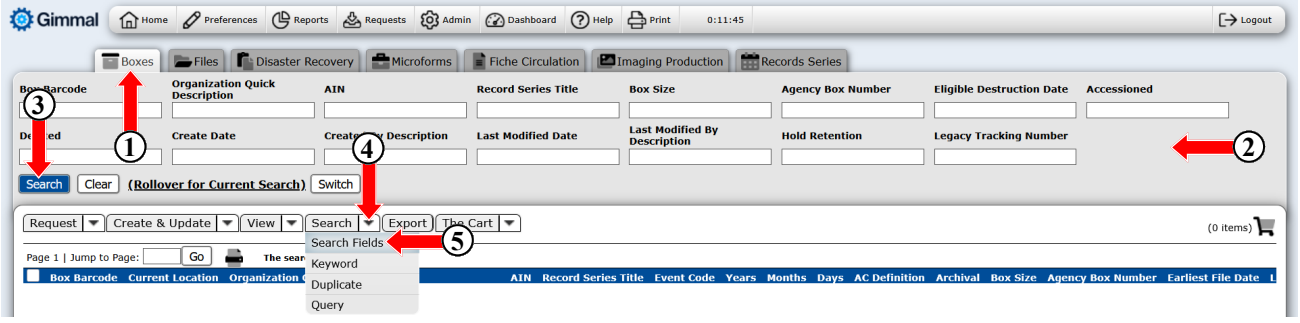
A note about updates

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

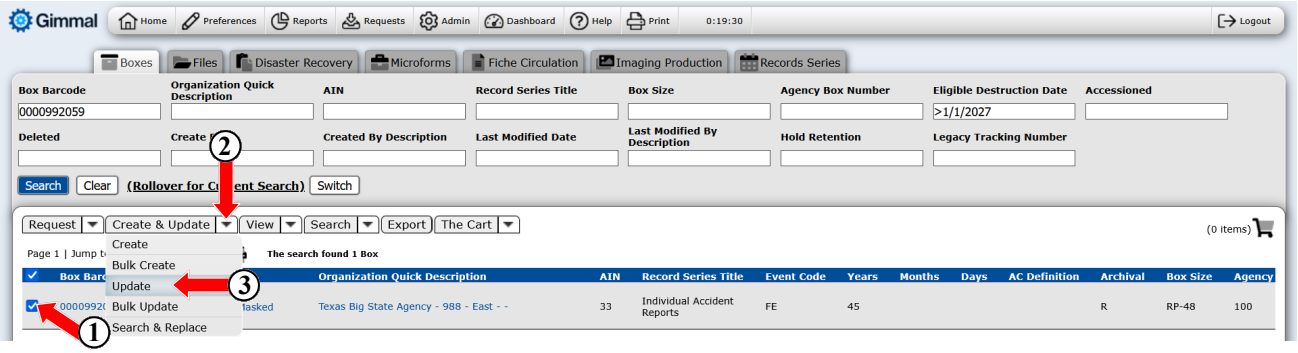
If any of these fields are updated, a new label is required. To get the new label printed:
For items at the SRC: Contact the SRC Circulation Desk (see **Contact List**, page 16).
For items that have been delivered from the SRC: When requesting pick up, use the **Comments** field to explain that a new container label needs to be printed due to field updates.

Update: A single item



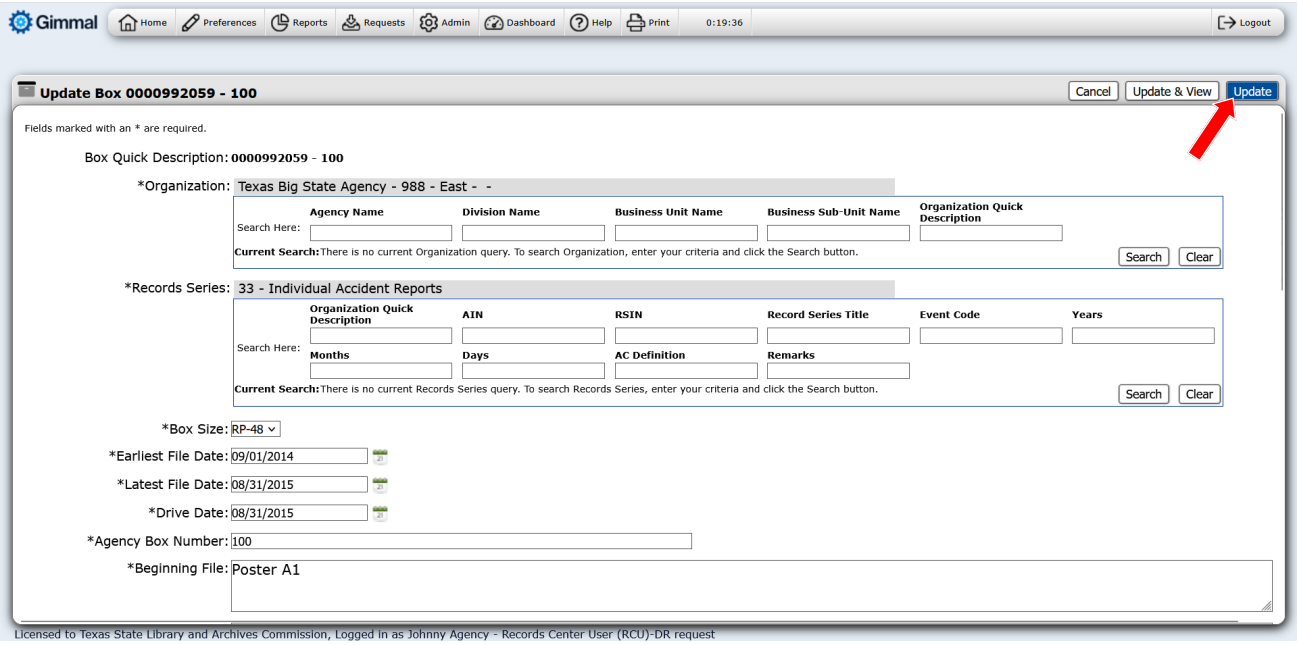
1. Select the tab.
2. Enter search terms into the **Quick Search**.
3. Click once on the **Search** button.
   OR
4. Click once on **Search**.
5. Click once on **Search Fields** then complete data fields on the Search screen.

Search results



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**.

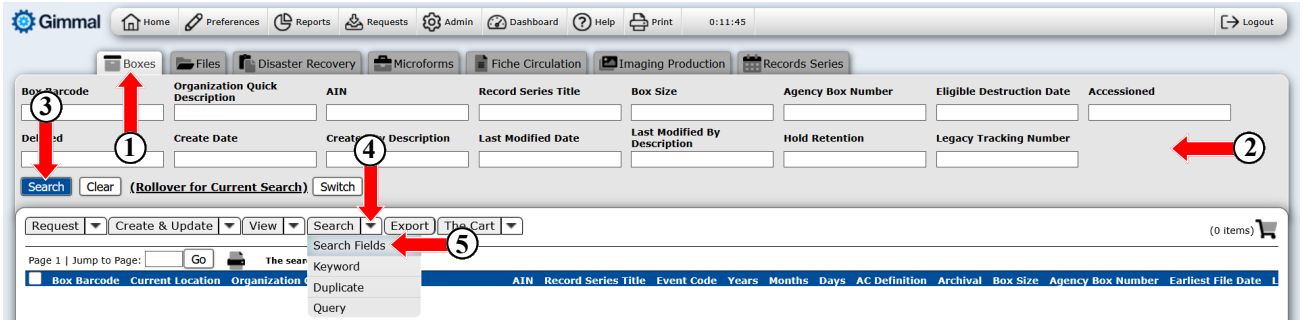
Update Box screen



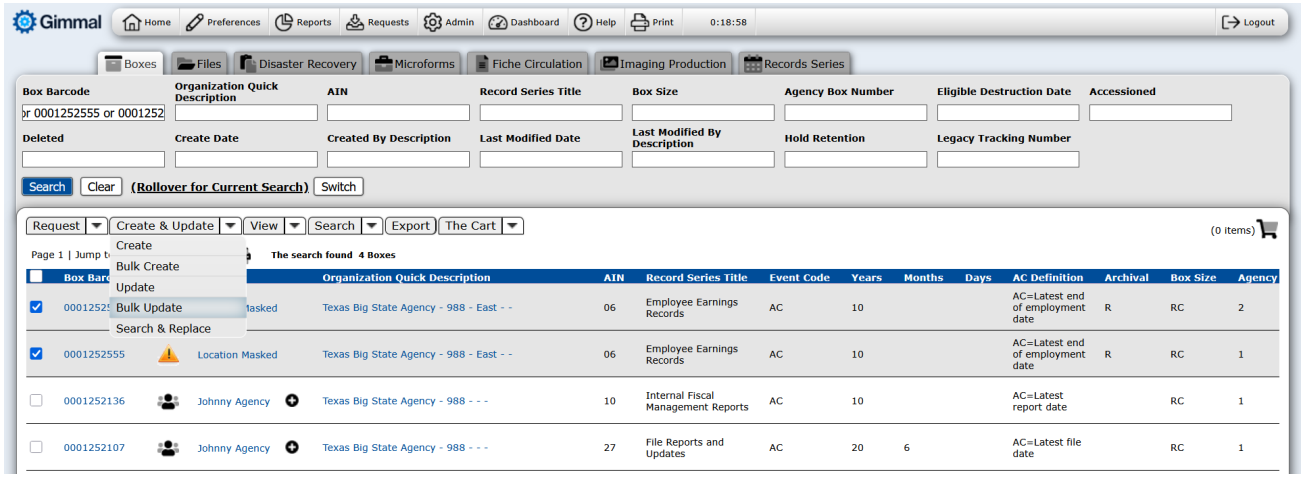
Update the appropriate field(s) then click once on the **Update** button at the top right.

BOXYBIT *If **Organization** is updated, the **Record Series** will need to be selected.*

Bulk Update*: Several items



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.



Either method will result in information populating in the tab's home page grid.

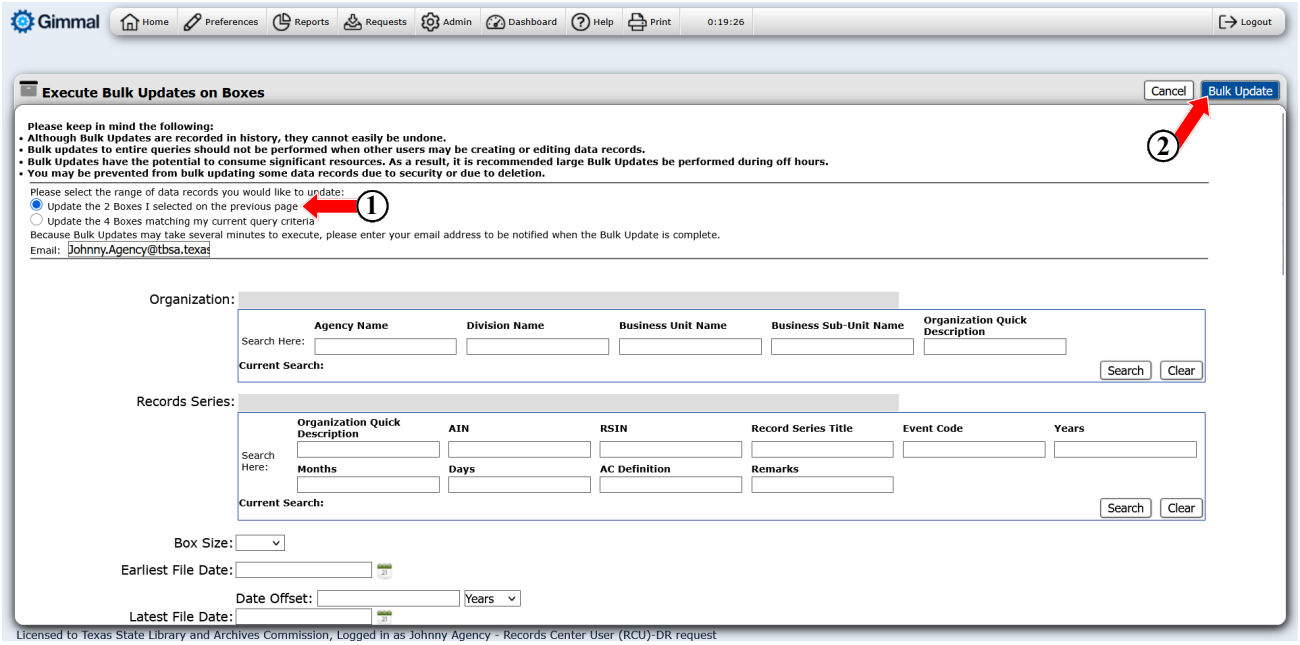
UPDATE SOME: If **some** items are to be updated, click once on checkboxes on the left side of the grid **(1)**. If items appear on multiple pages **(2)** turn to ***Supplemental Information: Preferences: Number of items on home page*** (Page 175) to update the home page grid so all items appear on a 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

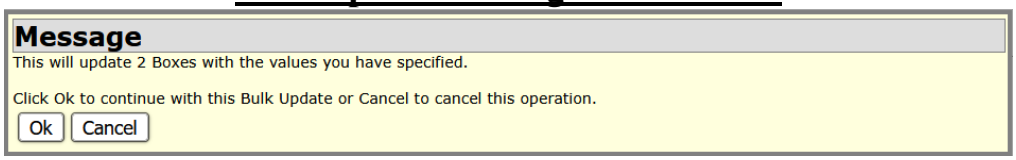


At the top left of the screen **(1)** the upper radio button is selected if any checkboxes were selected on the previous screen when some items on the home page grid are to be updated. The lower radio button is selected if no checkboxes were clicked on the previous screen and all items on the home page 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 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.

Bulk Update Message information



This dialogue box explains how many items are to be updated. Click once on **Ok**.

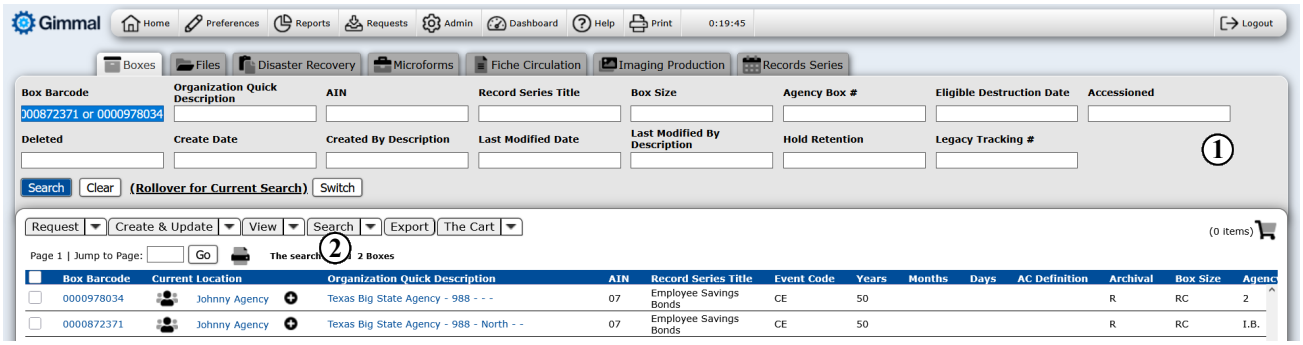
If there are only a few items to update, the update may take effect instantly. If there are several items to update, it might take a while for the update to complete. Either way, when a bulk update is complete, the person who performed the bulk update will get an email that explains how many items were updated.

NOTES

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...

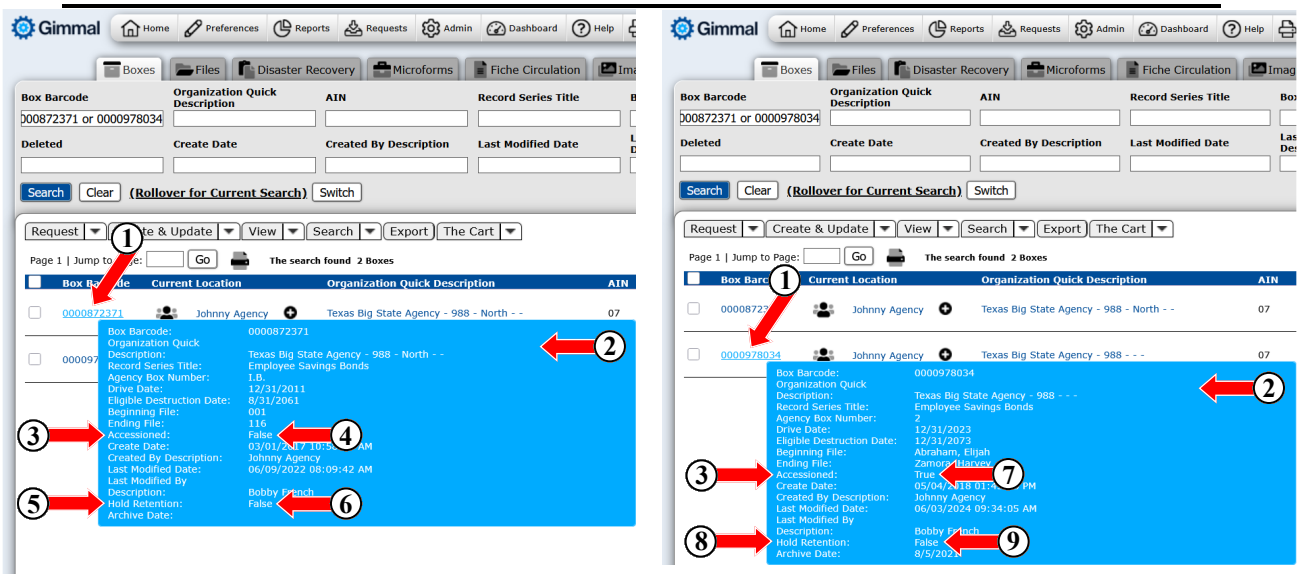
Find items to be deleted



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



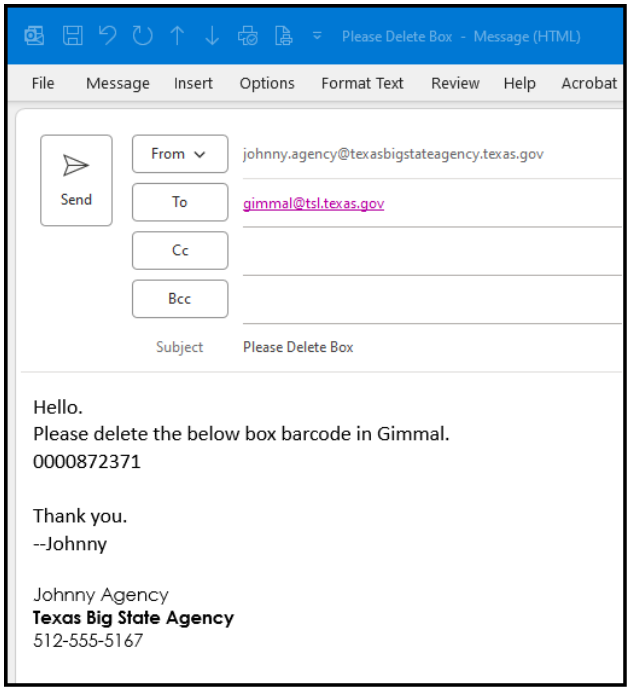
Hover the mouse cursor over (do not click) the item's barcode **(1)** for a popup window **(2)** to show. Look **(3)** to **Accessioned**. If it **(4)** is **False** and **(5)** the **Hold Retention** field **(6)** is **False**, the item can be deleted. Continue to Page 218.

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.

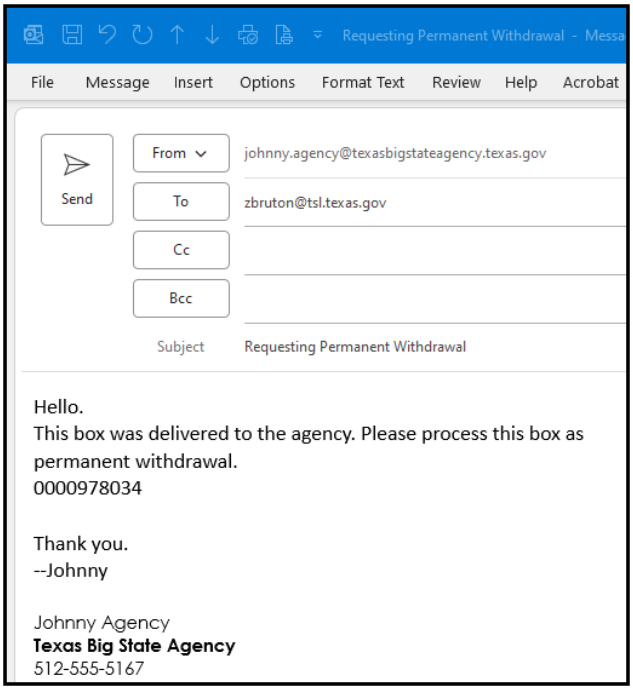
Permanent Withdrawal:
Accessioned items at the SRC with **(8)** the **Hold Retention** field **(9)** marked **False**: Select item(s), then select **Delivery from SRC** on the **Request** dropdown, then see ***Supplemental Information: Alternate Fulfillment Method*** (Page 177).
Accessioned items at 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



Email: Accessioned items for Permanent Withdrawal



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.

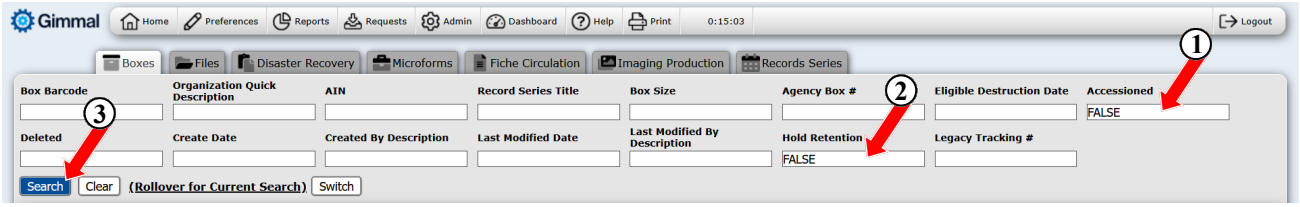
Email: Accessioned items for Permanent Withdrawal - Accessioned boxes or microfrm items at the SRC or delivered to the agency from the SRC (delivered items must be assigned to an employee at the agency in the current location column) can be permanently withdrawn by sending an email to the SRC manager **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



- On the **Boxes** or **Microforms** tab:
  1. 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.*
  2. 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.*
  3. 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.

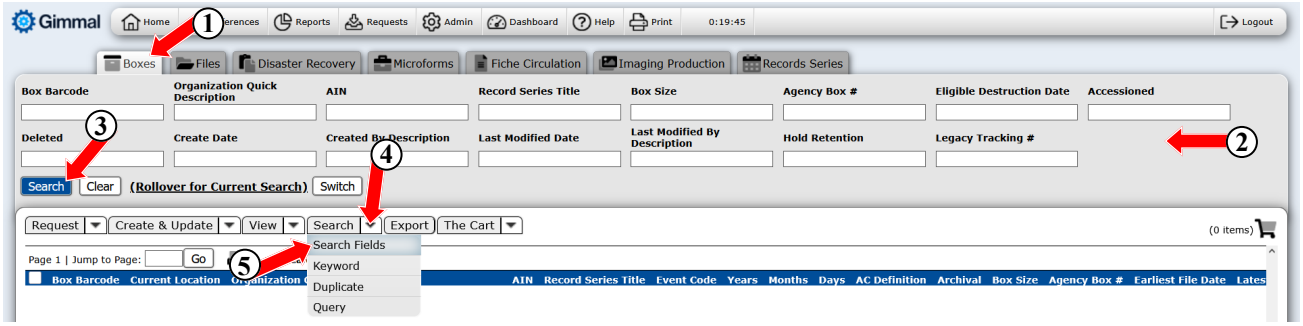
BOXYBIT *Why is it important to have items deleted from Gimmal?*
Gimmal items created in error (or items created but never sent to the SRC) should be removed from Gimmal to avoid confusion with legitimate items that have been sent to or delivered from the SRC. It is just good housekeeping to have only relevant items in Gimmal.

NOTES

Supplemental Information: Export

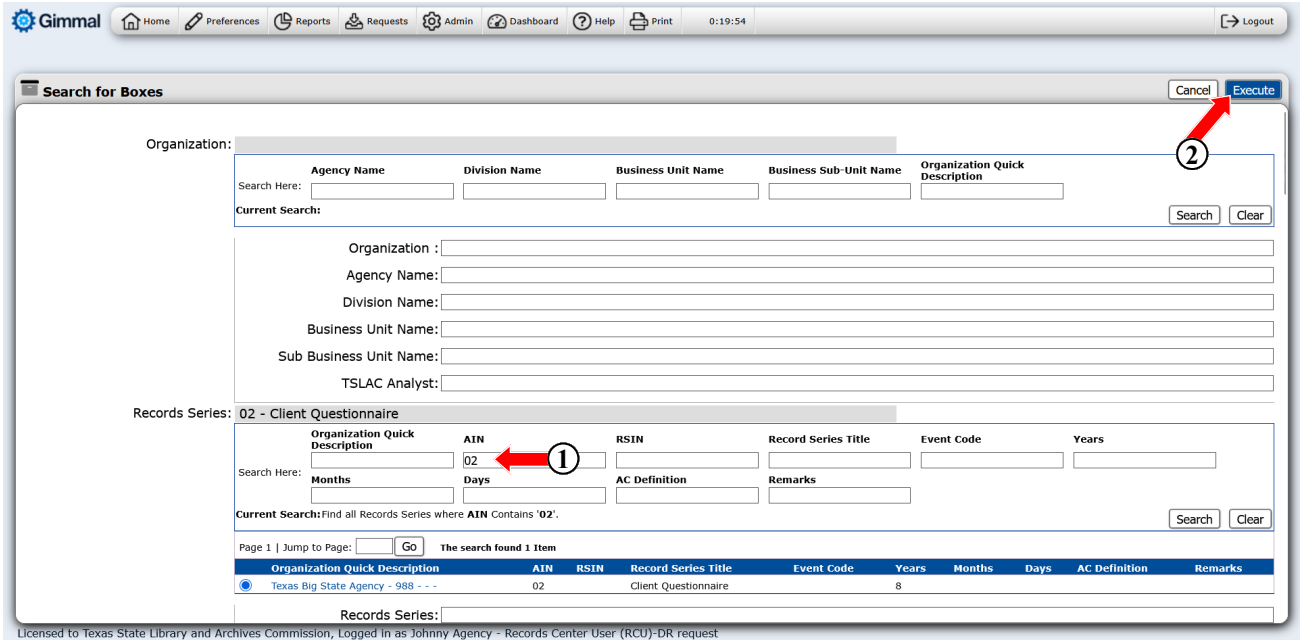
The process illustrated in this section to export items from Gimmal to a worksheet begins with a search that is exported and opened in Excel (a worksheet application).

Search for items to export



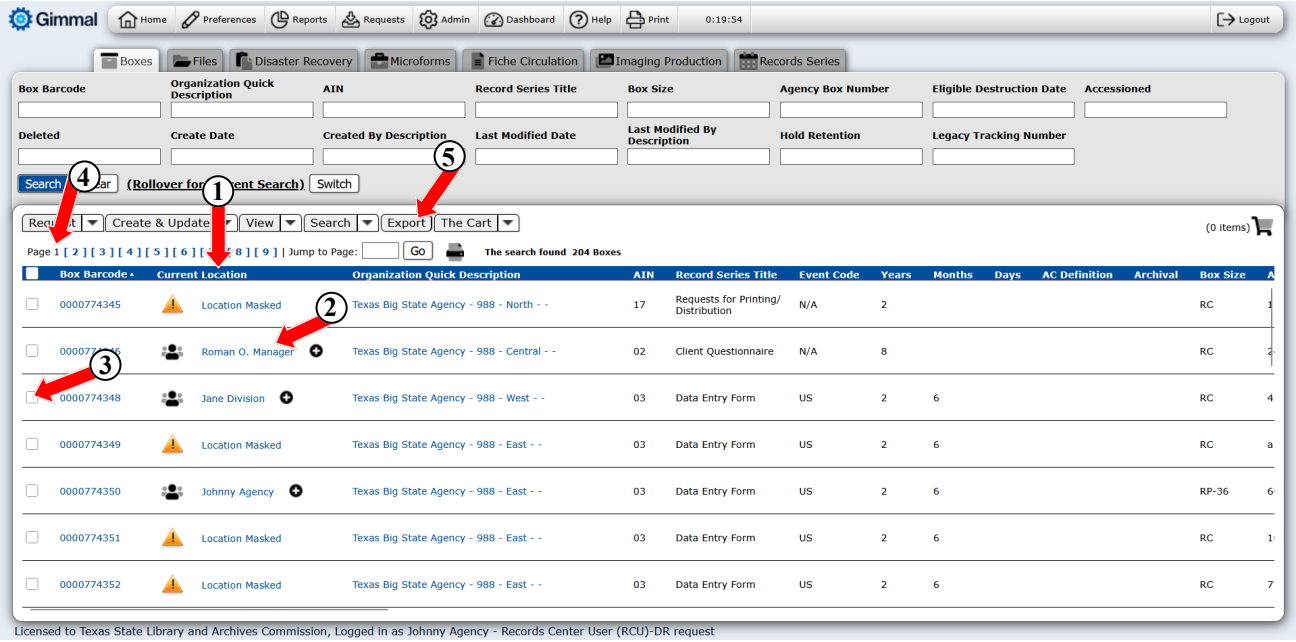
1. Click once on the item type tab.
   Then
2. Type search terms into any **Quick Search** fields to find items or click once **(3)** on **Search** to find all items at the agency and at the SRC.
3. Click once on **Search**. If results populate in the grid, continue to **Search results, Export items** (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** .

Search results, Export items

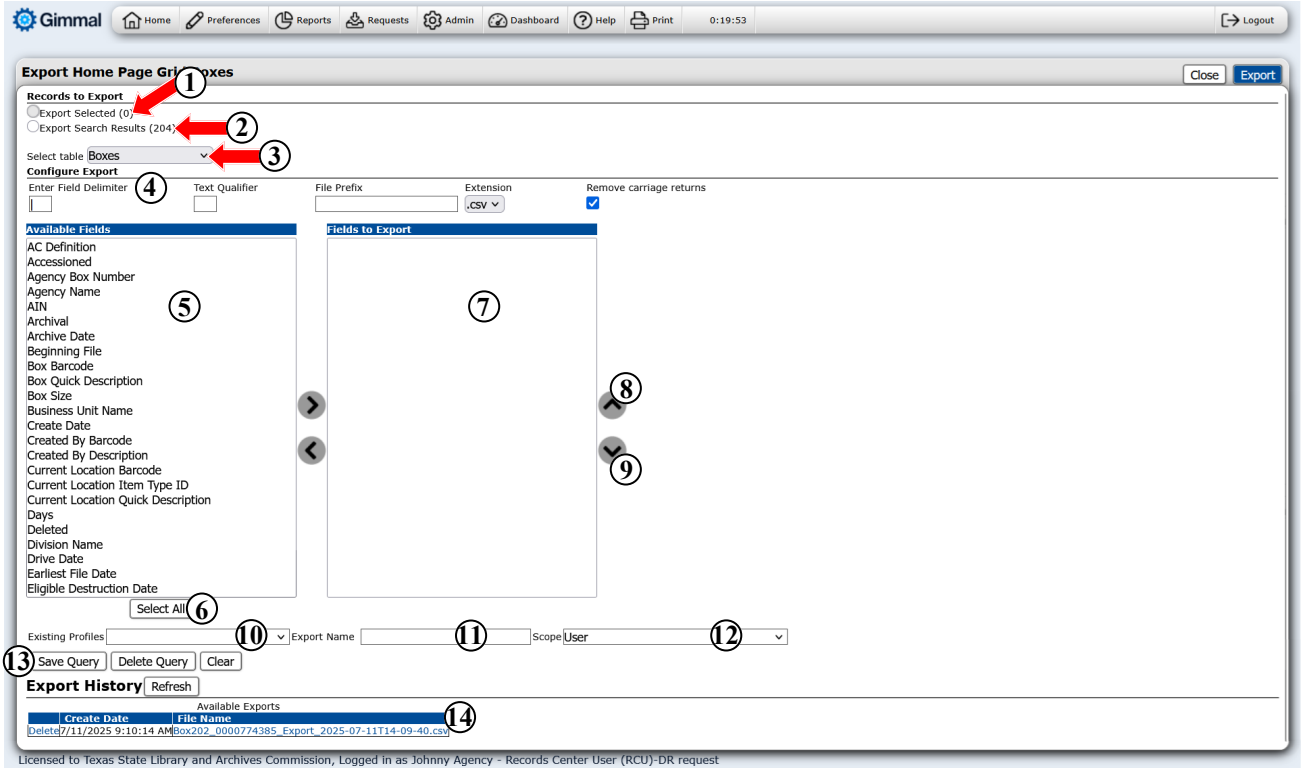


The **Current Location (1)** shows which items are currently at the agency or at the SRC. When Location Masked shows in the Current Location **(2)**, that indicates the item is at the SRC. If a coworker's name is in the Current Location field, the item is at the agency. To export information, click the 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.

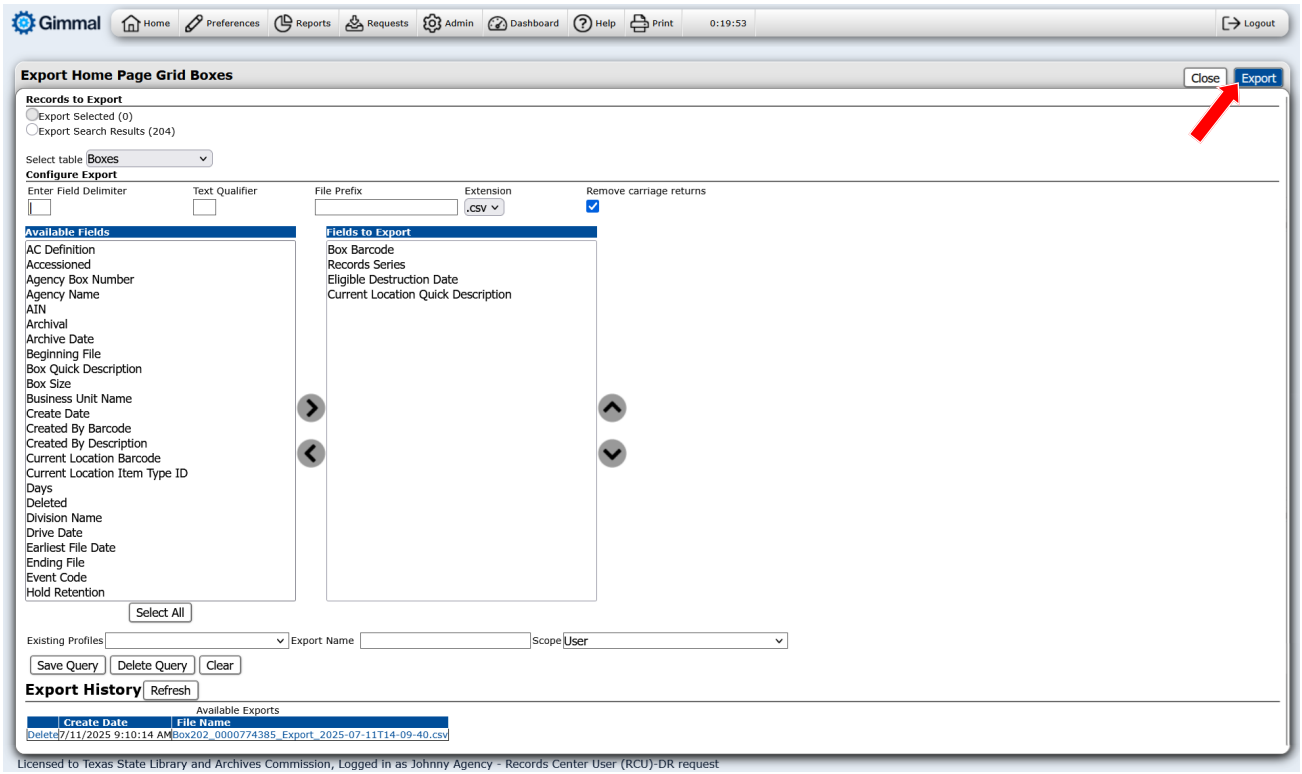
Parts of the Export Home Page screen



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 v 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.

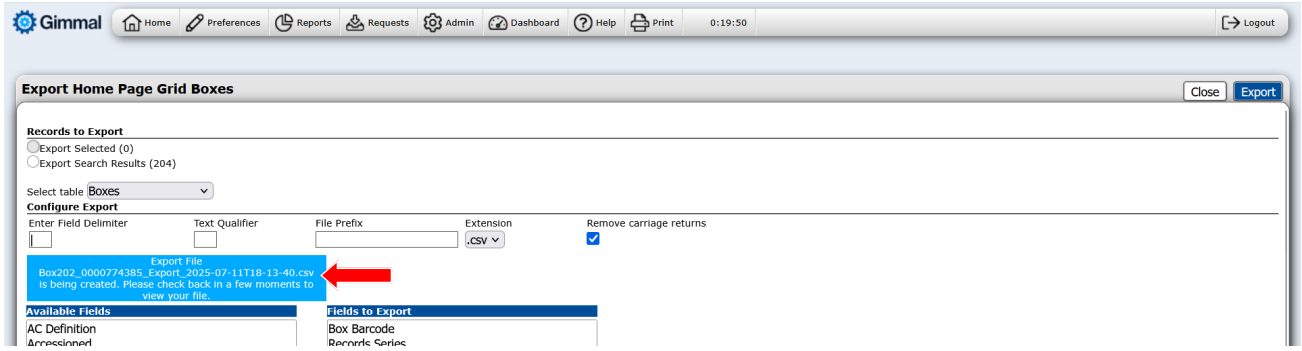
BOXYBIT *To see a definition for each export field name, turn to* ***Export Glossary*** *(Page 231).*

Export

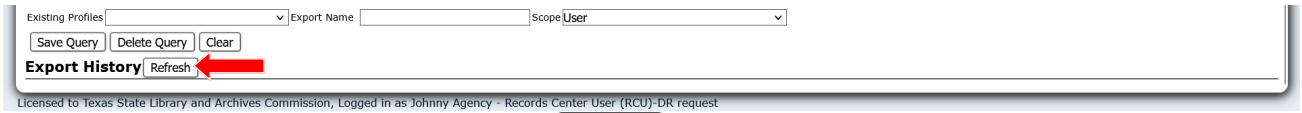


Click **Export** at the top right. Make sure pop-ups are allowed, contact the agency IT team for help.

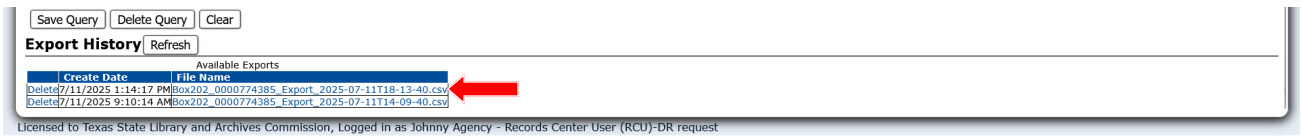
Export File popup



A popup like this will show near the top of the screen. If this popup does not show, go to Page 225.



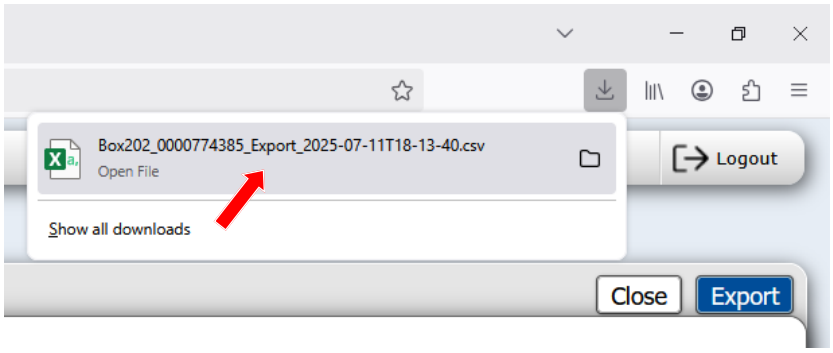
Wait a few minutes then click once on the Refresh button near the bottom of the screen.



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.

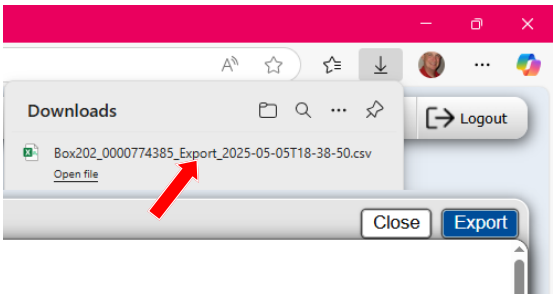
Export Excel File

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**:



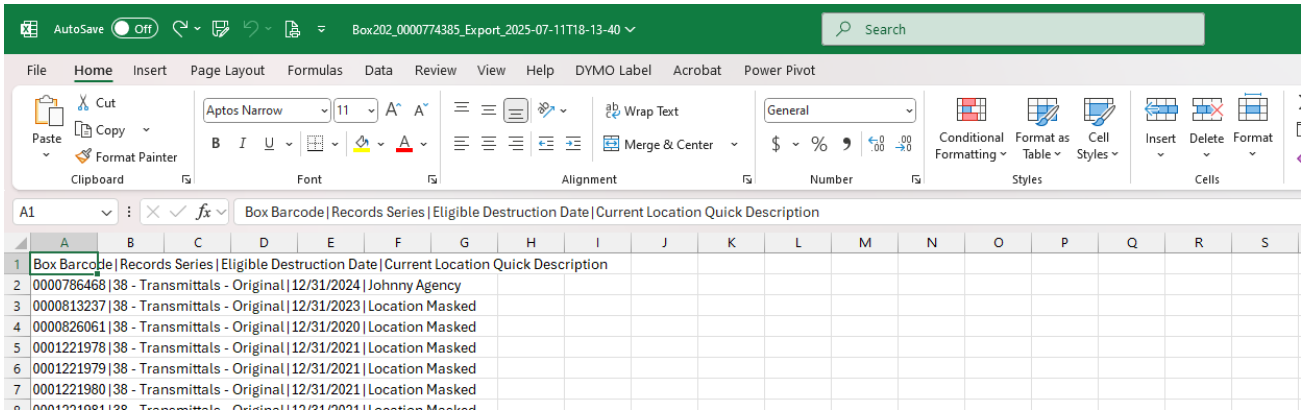
Click once on the file information to open the Excel worksheet.

For **Microsoft Edge**:

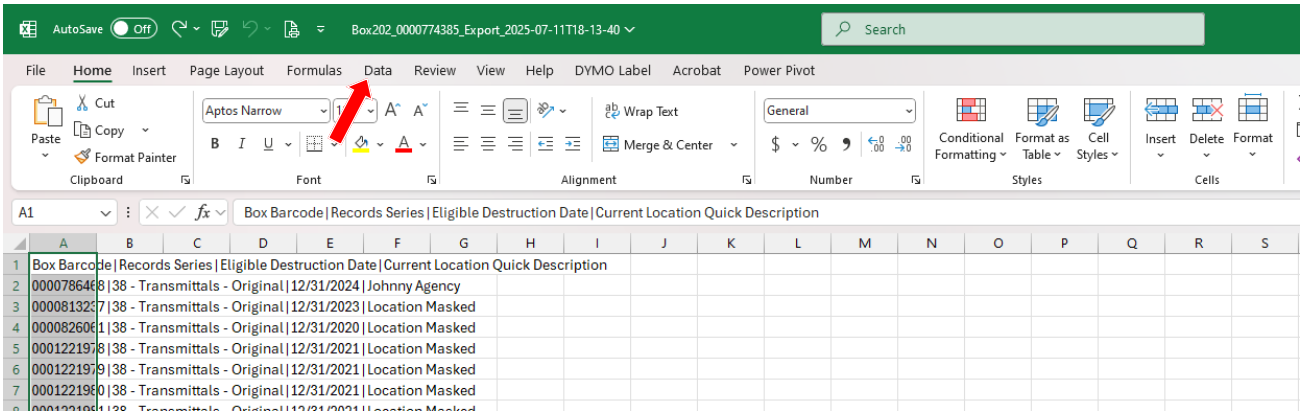


Click once on the file information to open the Excel worksheet.

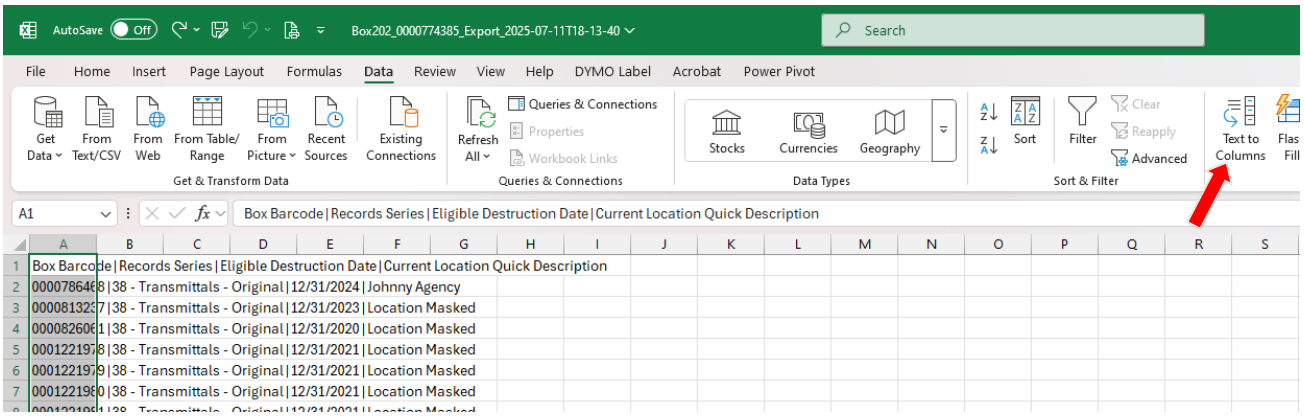
Convert Text to Columns on the Excel Worksheet



With the first cell on the worksheet selected, select the entire column by holding **SHIFT** and pressing **A**.



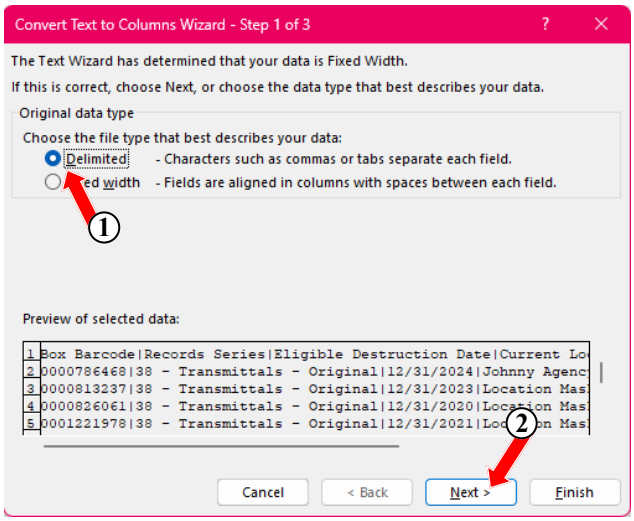
With the text in the first column selected, click once on the **Data** tab at the top of the screen.



When **Data** was clicked, a new set of menu options appears. Click once on **Text to Columns** in the Data Tools menu.

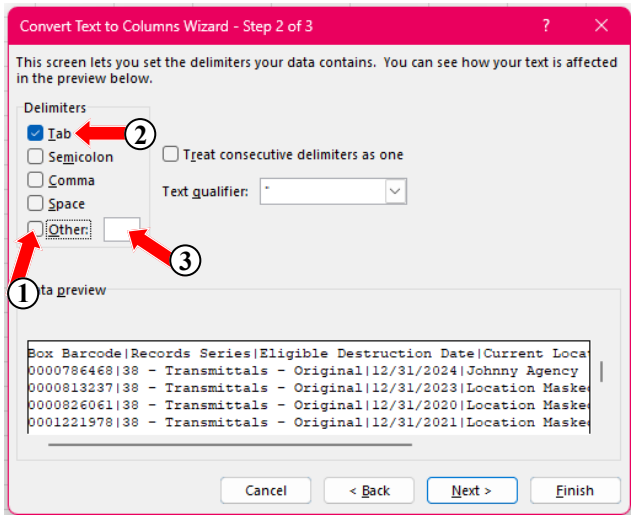
BOXYBIT *The Text to Columns icon might look differently depending on the version of Excel.*

Convert Text to Columns Wizard: Step One



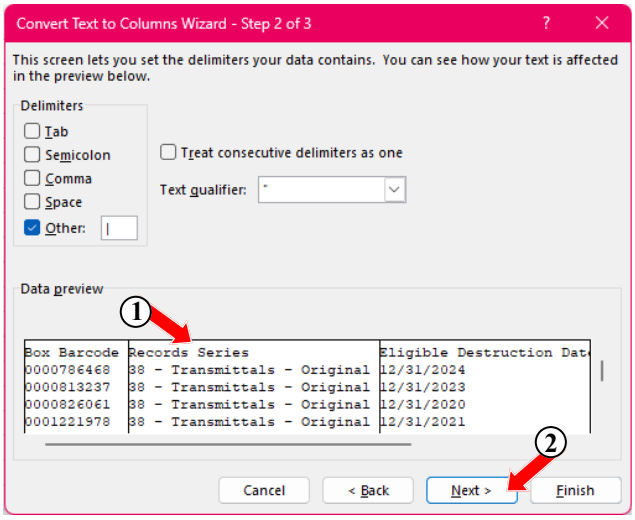
The first step: Click once **(1)** on the radio button for **Delimited** then click once **(2)** on **Next**.

Convert Text to Columns Wizard: Step Two



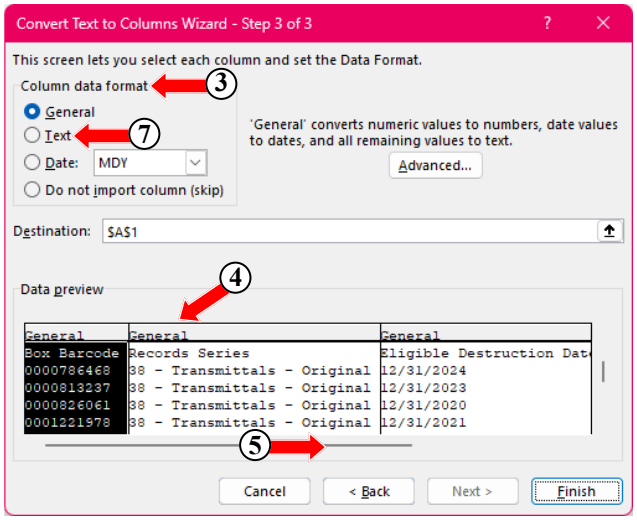
The area to modify in this step is **Delimiters**. Click once on the checkbox **(1)** for **Other:**. If anything else is selected (Tab, in this case **(2)**), deselect it. Click once **(3)** in the data field next to **Other:** and type the Pipe symbol. Use **SHIFT** \ to create the Pipe symbol |

Convert Text to Columns Wizard: Step Two (continued)

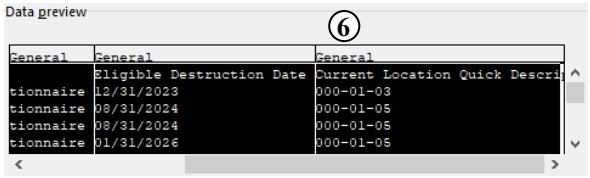


When the checkbox is selected for Other and the Pipe symbol is in the Other: field, the **Data Preview** section **(1)** converts the information to columns. Once the screen looks similar to the above illustration, click once **(2)** on **Next**.

Convert Text to Columns Wizard: Step Three

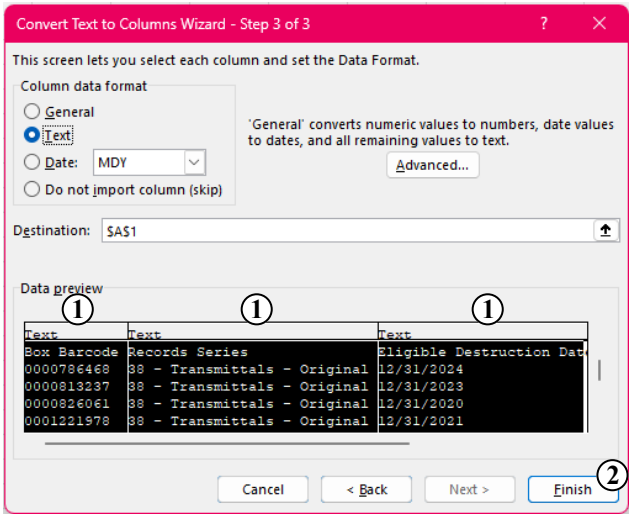


What is selected **(3)** in the **Column data format** section affects the information for each column **(4)** in **Data Preview**. The first column is already selected (the black box with white text is an indication that area is selected).
The first thing to do is select all of the columns in the **Data 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.



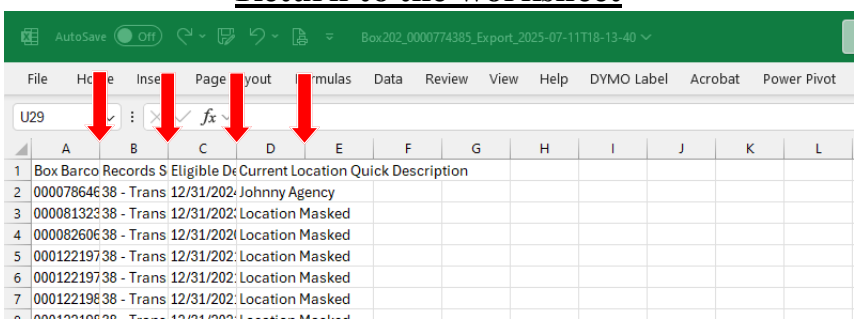
Return to **Column data format** (in previous illustration**)**, click once **(7)** on the radio button for **Text**.

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.

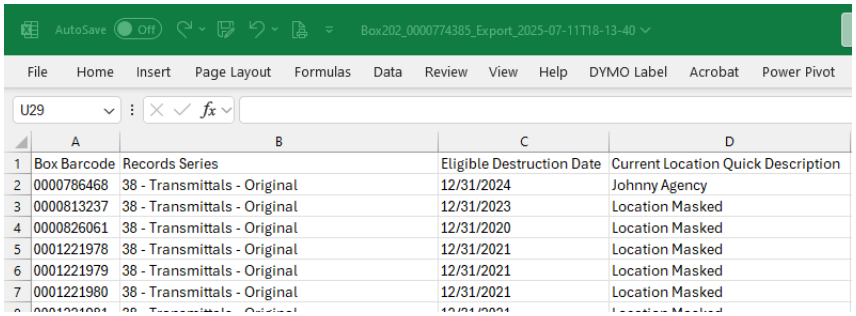
Return to the worksheet



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.

NOTES

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.*

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 esport. *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.*

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.*

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.*

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 Gimmal. Gimmal 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 Gimmal. *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 Gimmal account. *Appears on the Individuals tab.*

Hold Retention: Displays as True on a worksheet (checkbox selected in Gimmal) for those items placed on hold, displays as False on a worksheet (checkbox not selected in Gimmal) 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 Gimmal. *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 Gimmal. *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.*

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.*

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.*

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.*

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.*

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.*

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.*

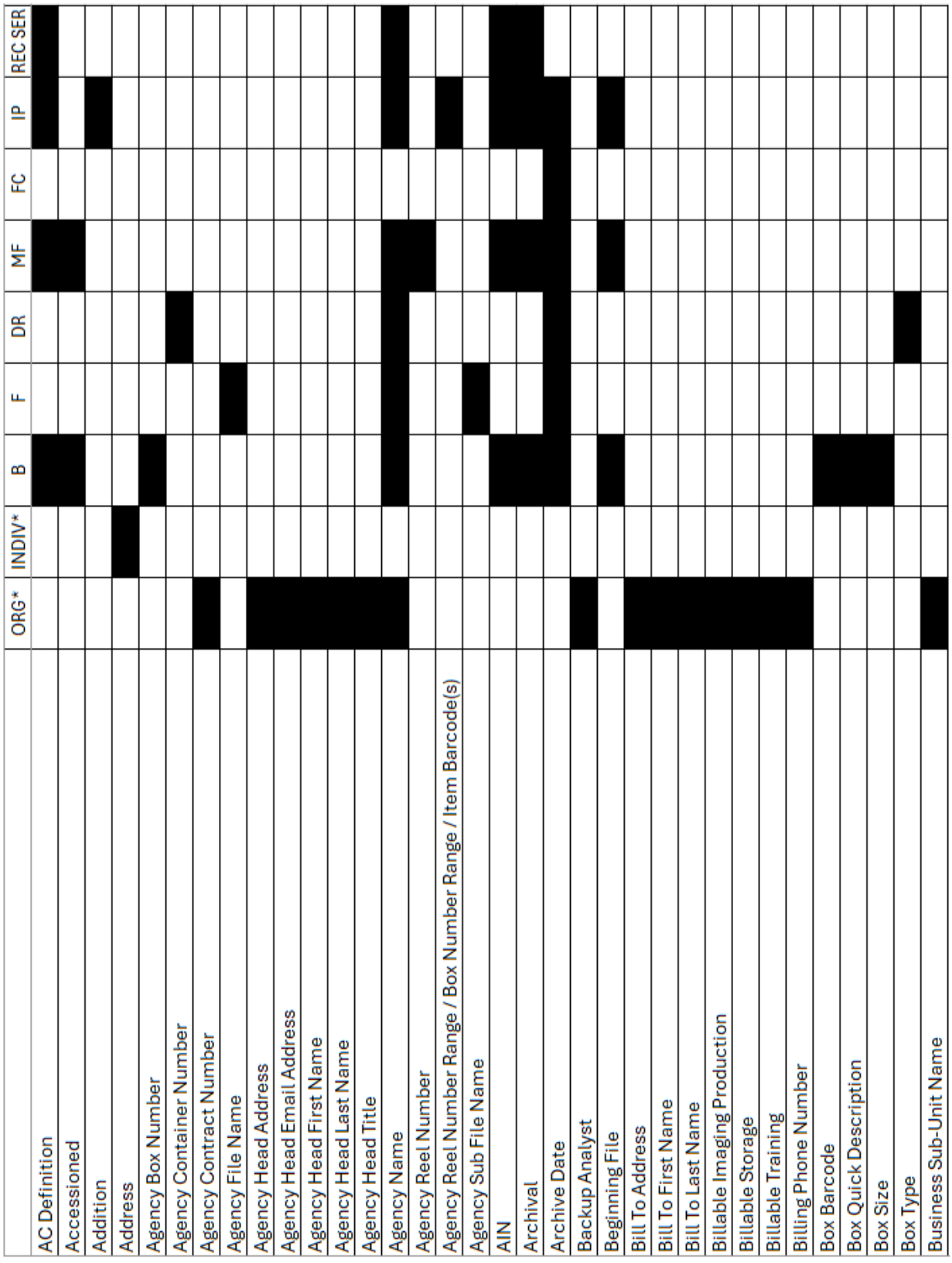
User Name: The login name for anyone who accesses Gimmal. *Appears on the Individuals tab.*

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.*

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

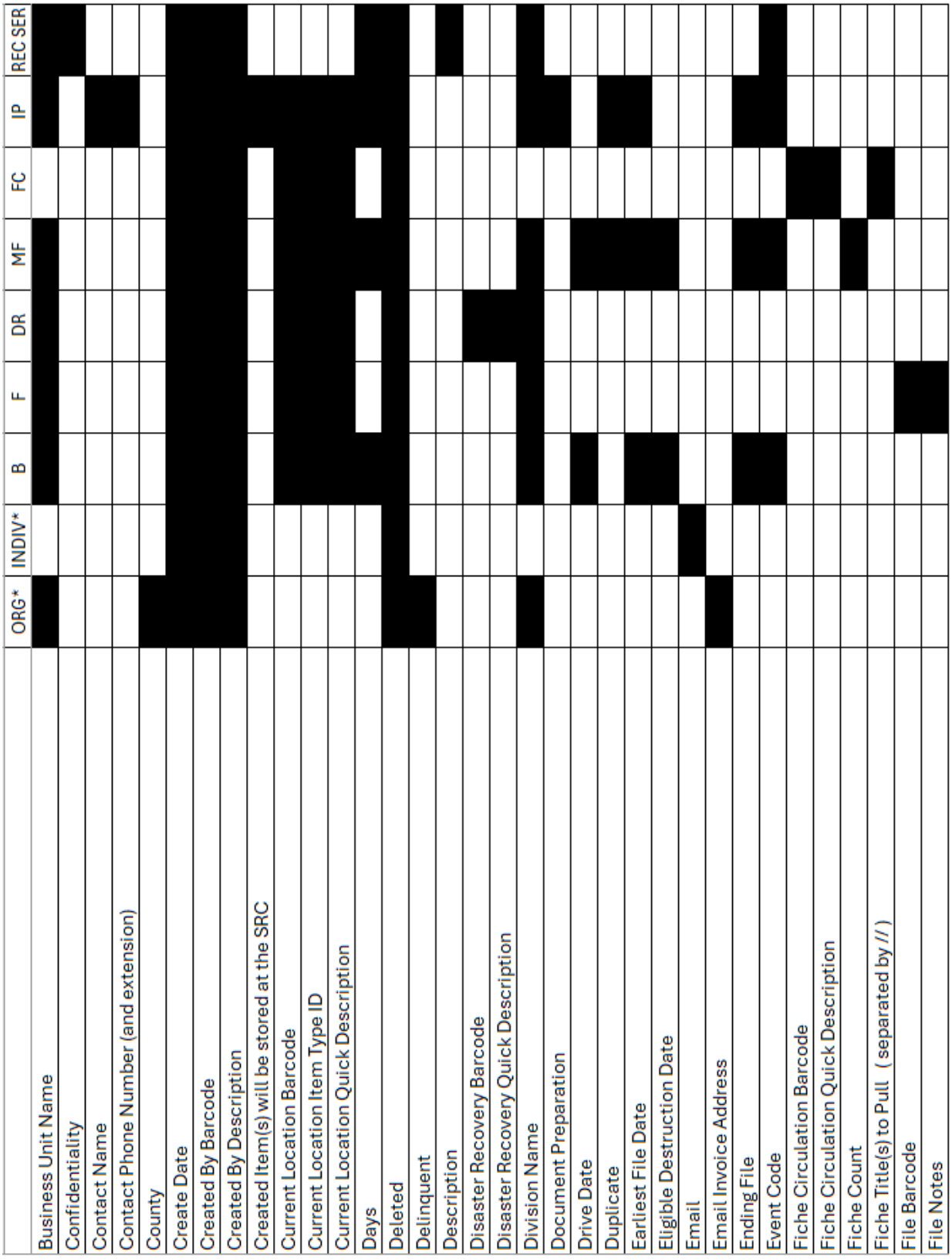


	ORG*	INDIV*	B	F	DR	MF	FC	IP	REC SER
AC Definition			■			■		■	■
Accessioned			■			■			
Addition								■	
Address		■							
Agency Box Number			■						
Agency Container Number					■				
Agency Contract Number	■								
Agency File Name				■					
Agency Head Address	■								
Agency Head Email Address	■								
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

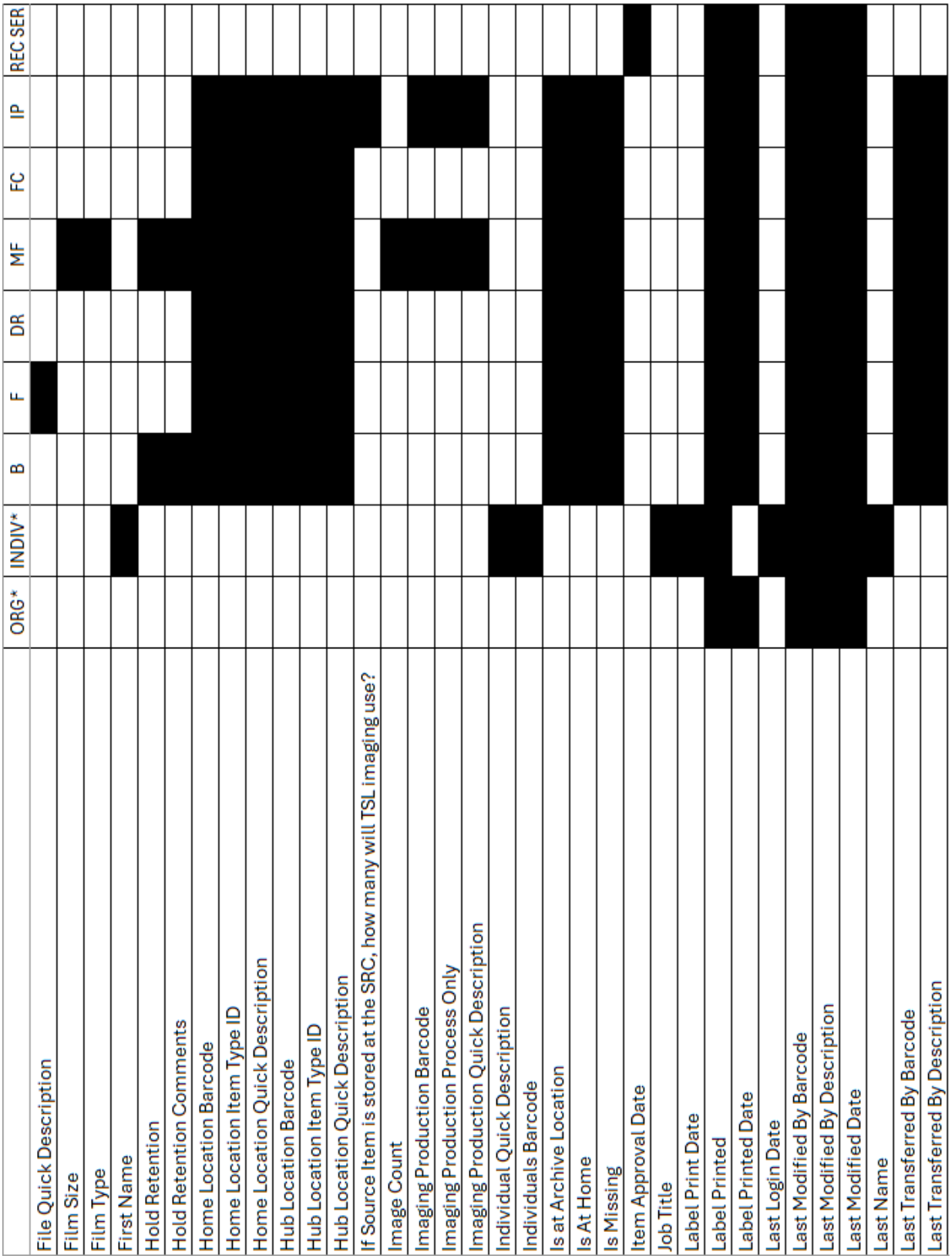
Export Fields and the Tabs Where They Appear



ORG=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

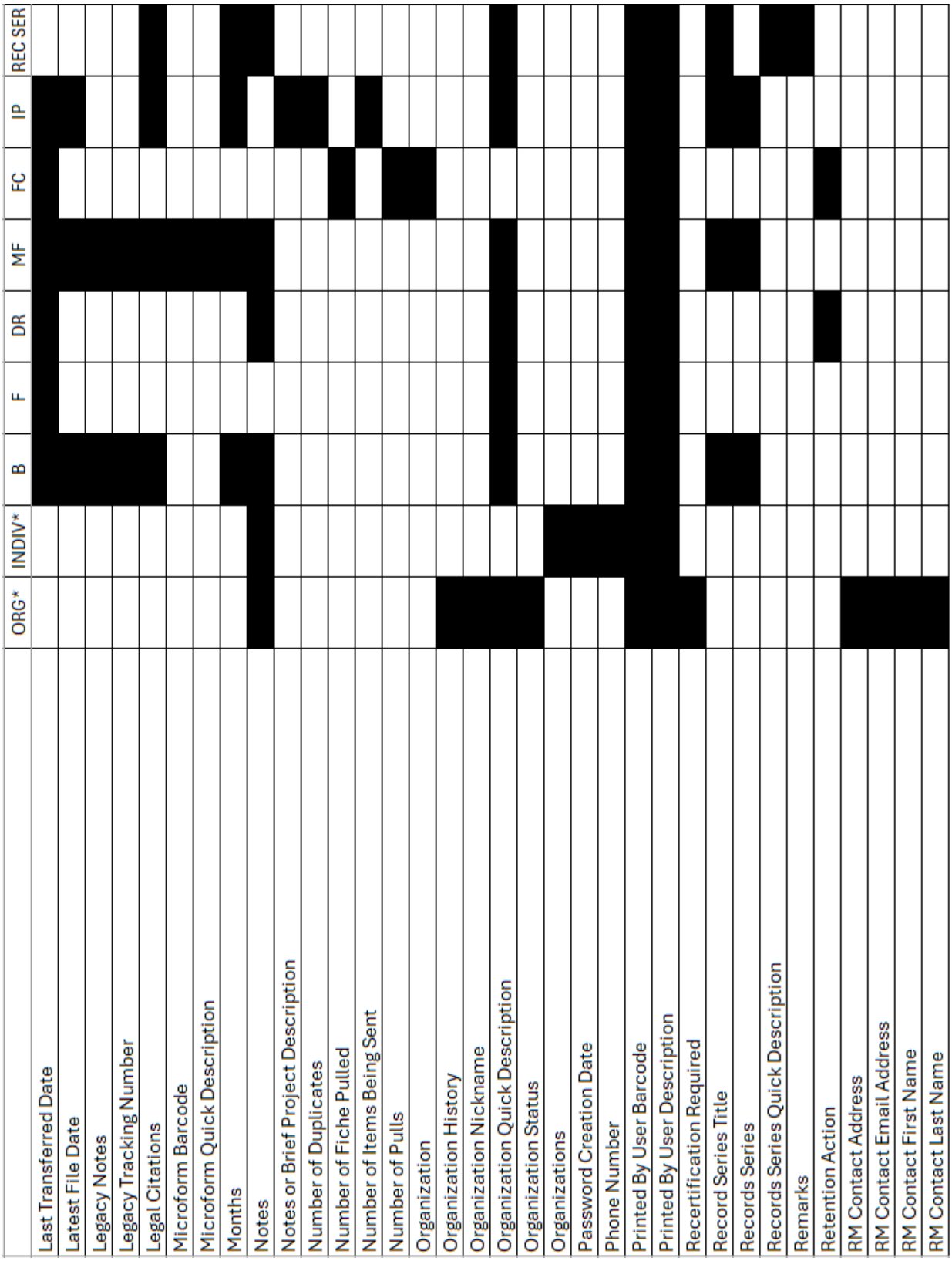
Export Fields and the Tabs Where They Appear



ORG=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

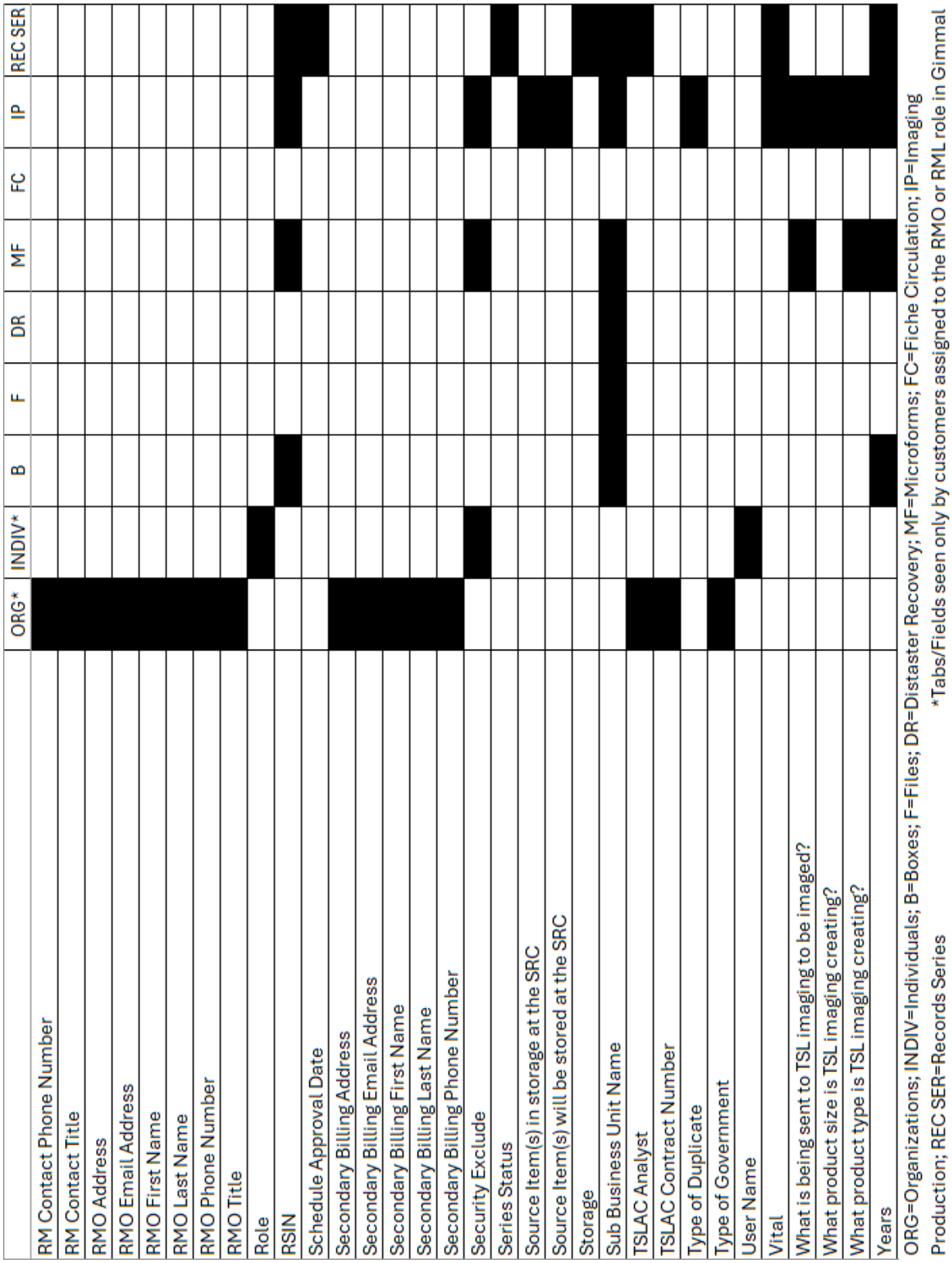
Export Fields and the Tabs Where They Appear



ORG=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=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

NOTES

RMO/RML Responsibilities in Gimmal

Gimmal

Instruction Guide

RMO/RML Responsibilities in Gimmal Instruction Guide
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NOTES

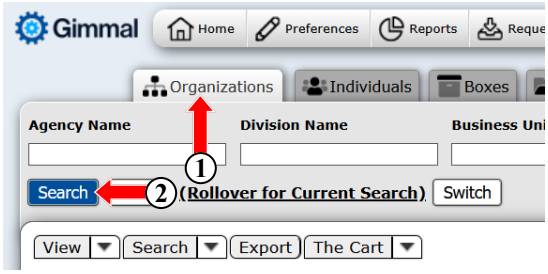
Organizations and Individuals

The Records Management Officer / Records Management Liaison (RMO/RML) at an agency is responsible for maintaining the information for the Organizations tab and for the Individuals tab in Gimmal. All requests to create, update, or remove information for Organizations and Individuals are processed by a Gimmal administrator at the Texas State Library and Archives Commission's State Records Center.

ORGANIZATIONS

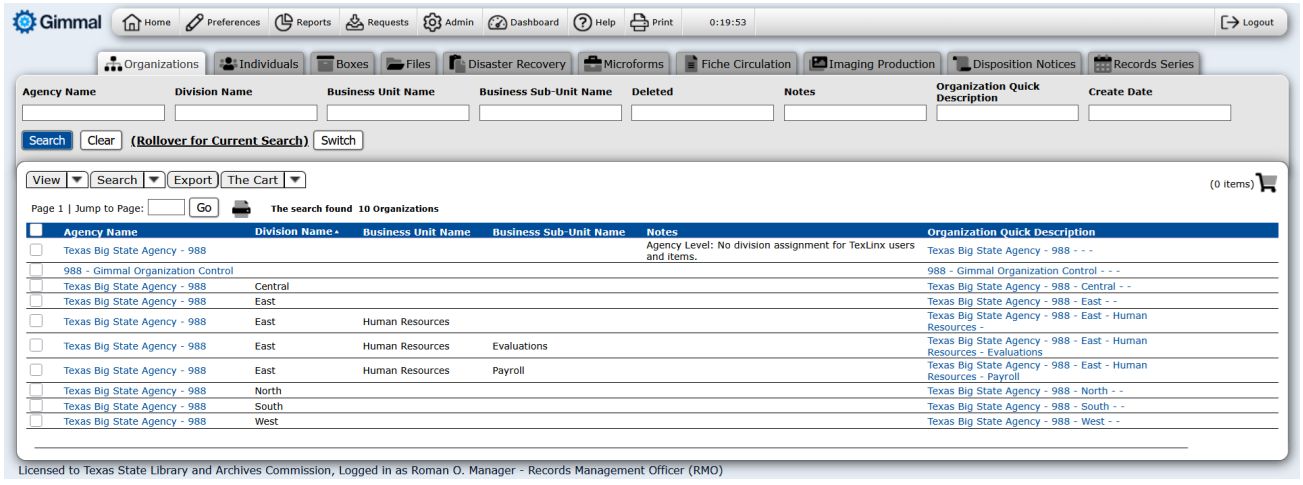
What is an organization? An organization is the Gimmal term for a single segment of an agency's structure as it appears in Gimmal. If the agency has 30 divisions, 31 organizations (including the agency-level with no divisional assignment) will appear in Gimmal if the RMO/RML has decided to add all 30 agency divisions. Beyond division, the hierarchical breakdown for an agency can go to business unit and business sub-unit, these two additional levels of structure are optional. The divisions, business units, and business sub-units that appear in Gimmal are at the direction of the agency's RMO/RML. Some agencies prefer to have only the agency-level with no divisional information in Gimmal.

View all Organizations for this agency in Gimmal



To view all organizations for the agency, click once on the **Organizations** tab **(1)** and click once on the **Search** button **(2)**. Use the quick search fields for a specific search.

Search results: Organizations



The list for the agency organizations populate in the home page grid.

Add, Modify, or Delete an Organization

The RMO or RML sends an email to **gimmal@tsl.texas.gov** to add, modify, or delete an origination (each process is explained in the following instructions). Please do not request more than one of these functions in the same email.

Add an Organization

List the new organization information according to the Gimmal formatting for Organizations:

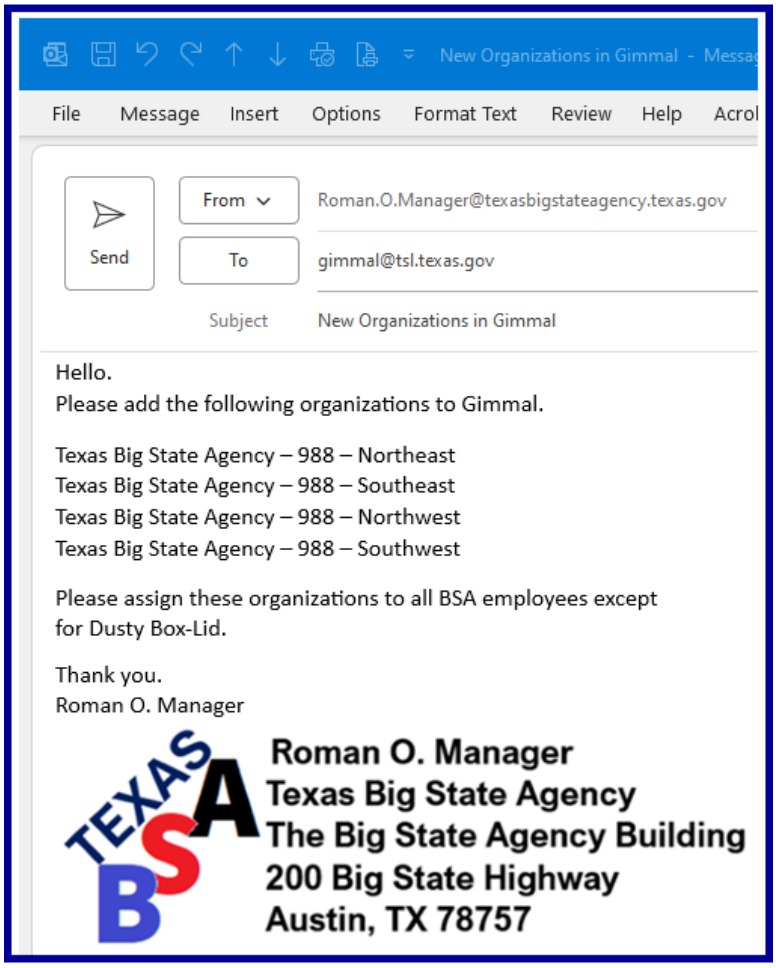
Agency Name – Agency Number – Division – Business Unit – Business Sub-Unit

(Business Unit and Business Sub-Unit are optional.)

The hierarchy needs to be followed when adding organizations:

- Business Unit cannot be created if there is not an existing Division for it to be assigned.
- Business Sub-Unit cannot be created if there is not an existing Business Unit for it to be assigned.

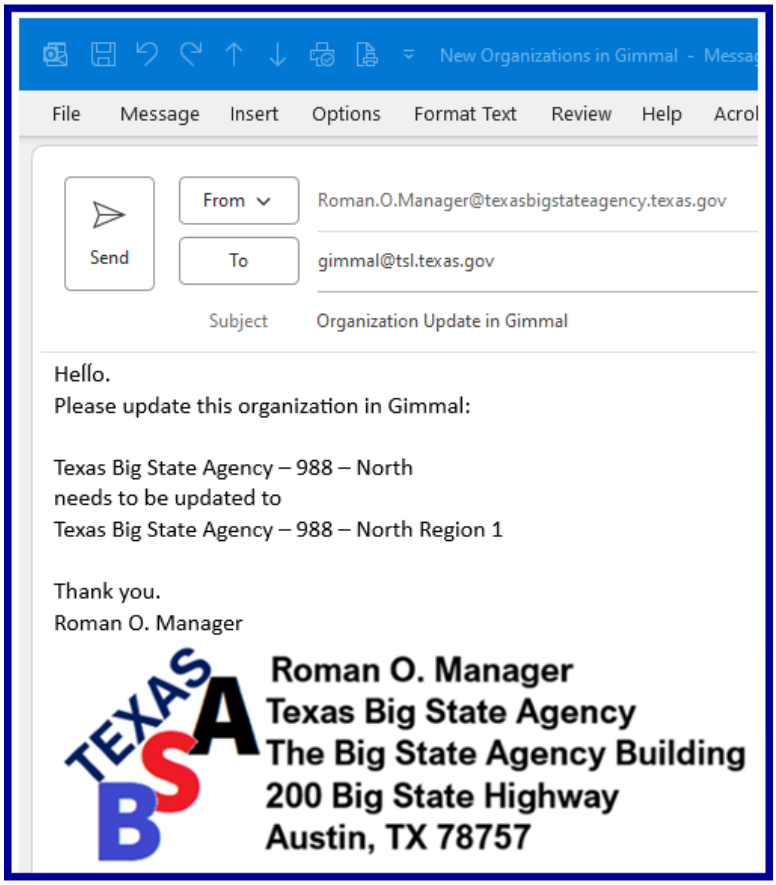
See the Organization section of the Gimmal User Information Form on Page 263 for an illustration of how the organization hierarchy appears in Gimmal.



Be sure to include which Gimmal users need to be assigned to the new organization(s). The person requesting the addition of the Organization(s) will receive a notification when the addition is complete. If the RML makes the request, the RMO is copied on the reply.

Modify an Organization

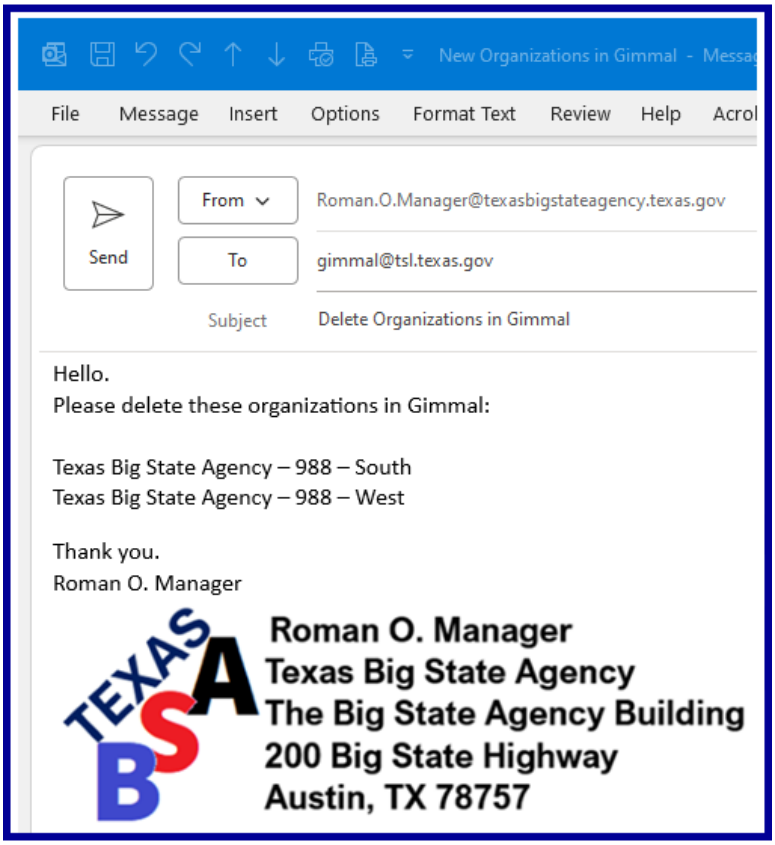
The RMO or RML sends an email to **gimmal@tsl.texas.gov** with the information as it currently appears in Gimmal and how the information needs to appear in Gimmal following the organization formatting as described in To Add an Organization.



This is an illustration for how the email might appear. All items and employees assigned to the updated Organization(s) will also show the updated information in their Gimmal account. The person requesting the update will receive a notification when the update is complete. If the RML makes the request, the RMO is copied on the reply.

Delete an Organization

The RMO or RML lists the organization(s) to be deleted in an email to **gimmal@tsl.texas.gov** . A Gimmal administrator will be in touch concerning individuals and/or items assigned to the listed Organization(s).



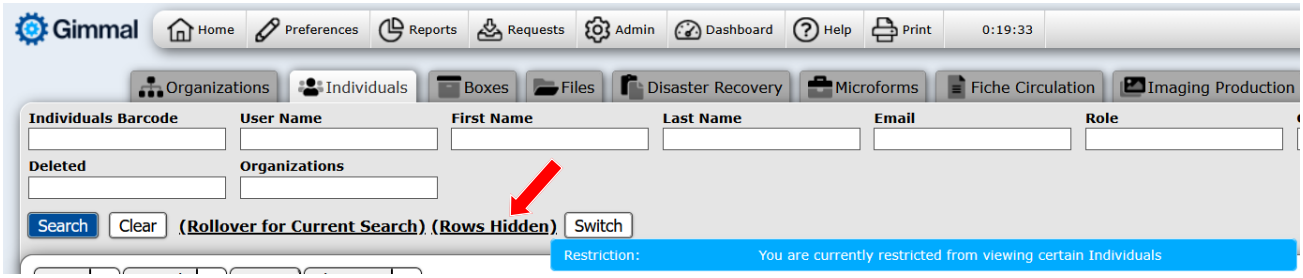
This is an illustration for how the email might appear. The person requesting the update will receive a notification when the delete process is complete. If the RML makes the request, the RMO is copied on the reply.

INDIVIDUALS

Individuals in Gimmal are those employees at the agency who are assigned to organizations and can perform work in Gimmal based upon the Role assignment. As explained on the following pages, the RMO or RML has several important responsibilities concerning the Individuals tab in Gimmal:

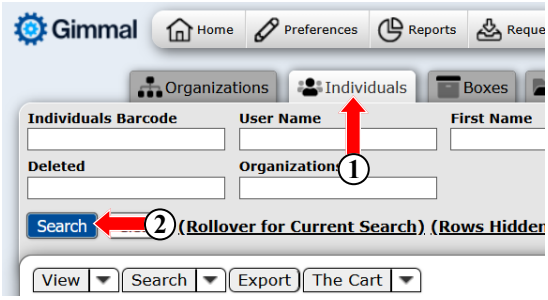
- Review on a regular schedule who has Gimmal access
- Search for specific individual information
- Add, modify, or delete the agency's Gimmal users (please do not request more than one of these functions in the same email).

Rows Hidden

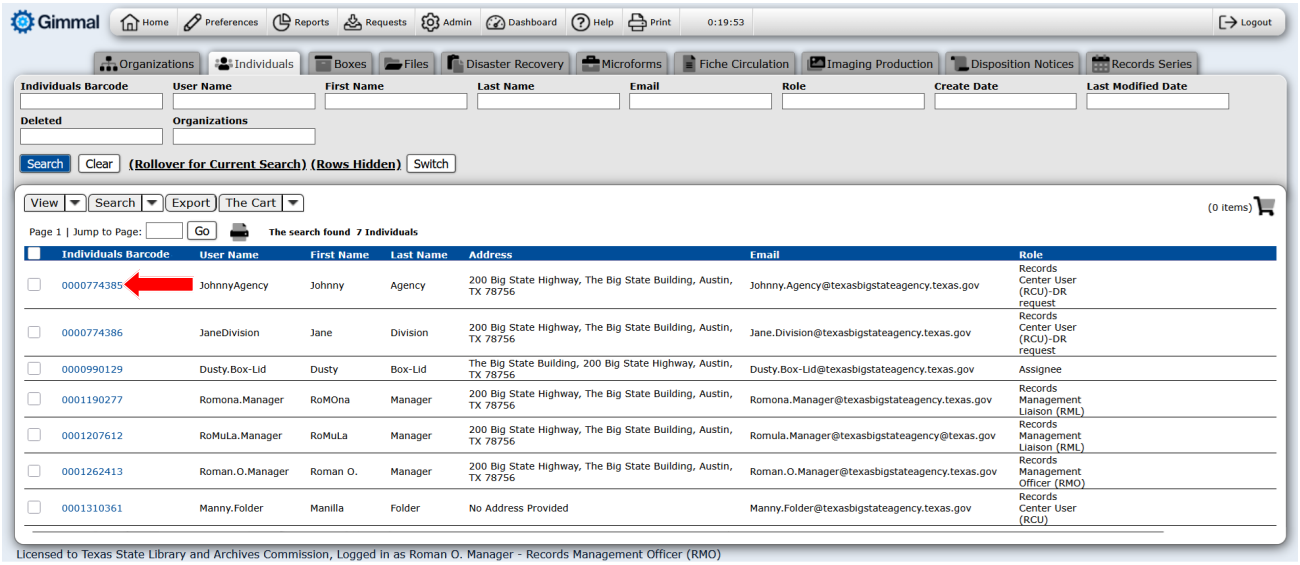


When the computer mouse hovers over **Rows Hidden** in the Quick Search area of the screen, the popup message "*Restriction: You are currently restricted from viewing certain Individuals*" is not something the Texas State Library or the State Records Center has any control. When a customer searches for accounts on the Individuals tab, the customer sees all employees assigned to any organization for that agency. No active accounts are being hidden from the customer. Please disregard this function; the software does not allow this to be hidden from the customer.

Review who has Gimmal access



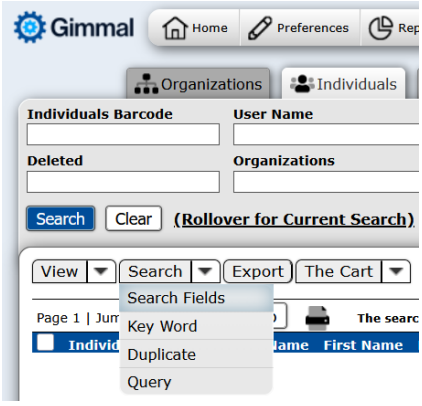
To view all employees at the agency who have Gimmal access, click once on the **Organizations** tab **(1)** and click once on the **Search** button **(2)**. Use the quick search fields for a specific search.



This shows every agency employee with Gimmal access. To view detailed information for an individual, click once on the number in the **Individuals Barcode** column for the employee.

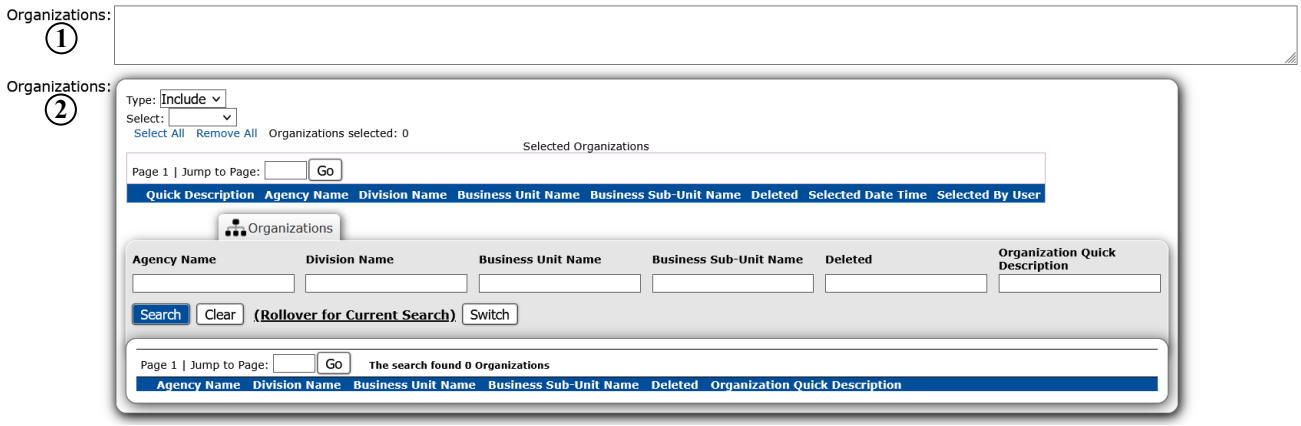
BOXYBIT *There might be multiple pages of employees.*

Use the Search and View dropdown menu



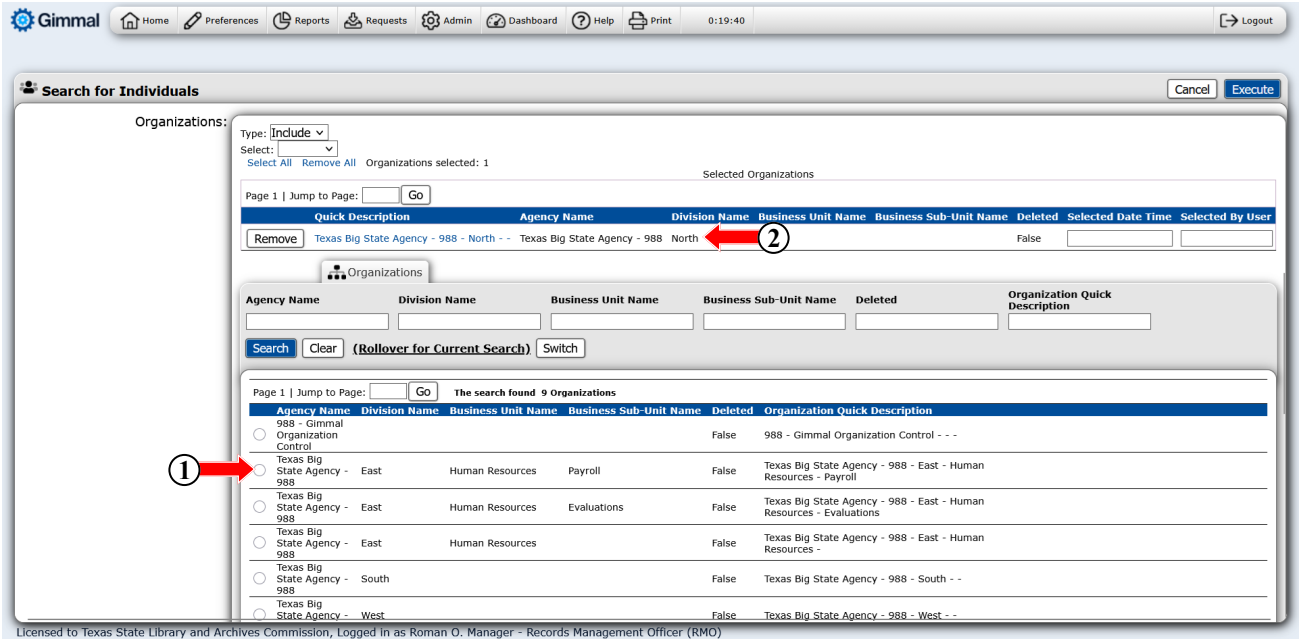
The Search menu is used for several kinds of searches. For example, to see employees assigned to a specific organization, click once **(1)** on **Search**, and click once **(2)** on **Search Fields**:

Search for Individuals screen



Any fields on the search screen can be used to search for employee Gimmal accounts. Scroll down the screen to find the **Organizations** section. If the Organization field is going to be used, the Organizations data field **(1)** can be used (click **Execute** after using this field), but it searches all Organization data fields for the search term used. So, it is not advised to use that field. Instead, use the Organizations table **(2)** to find the organizations for the agency. In the Organizations section, click once on the **Search** button to show all Organizations for the agency that are Gimmal. If a specific organization is needed, use any of the Quick Search fields then click the Search button.

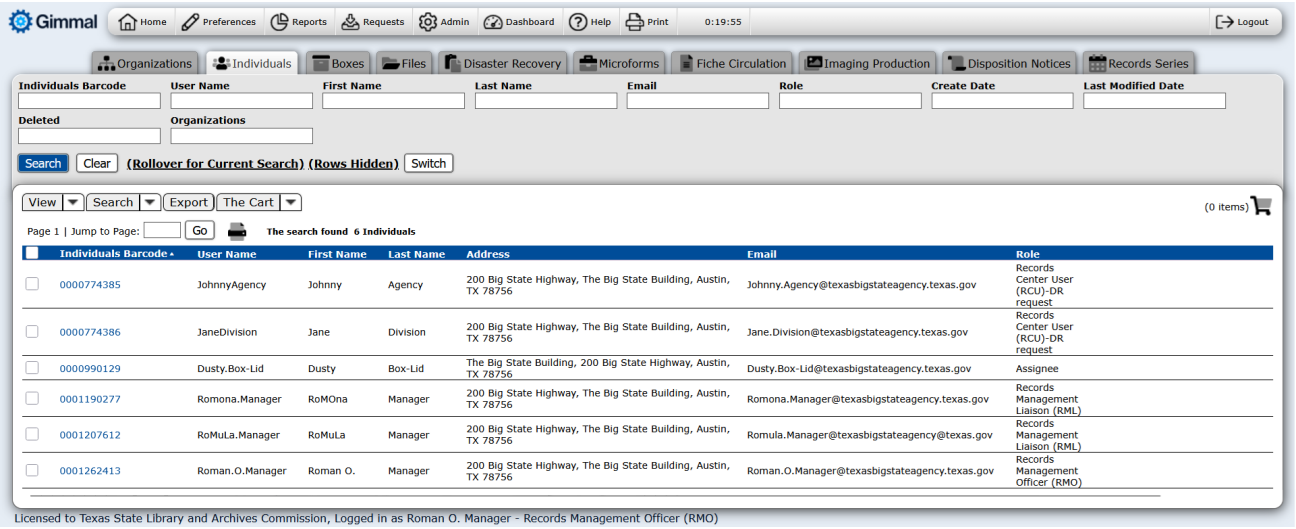
Select the Organization(s)



The organizations for the agency will populate in the grid. Select the organization(s) by clicking the radio button **(1)** to the left of the Agency Name column (or click the Select All checkbox near the top of this section select all organizations) to view the employees assigned to any of those organizations. As radio button(s) get selected (or the Select All checkbox is selected), a menu populates above the Organization tab grid **(2)**. In this illustration, one organization is selected. Click **Execute** at the top right when the search is complete.

BOXYBIT ***Type*** *and* ***Select*** *options near the top of Organizations are not used. Please disregard these.*

Search Results: Individuals

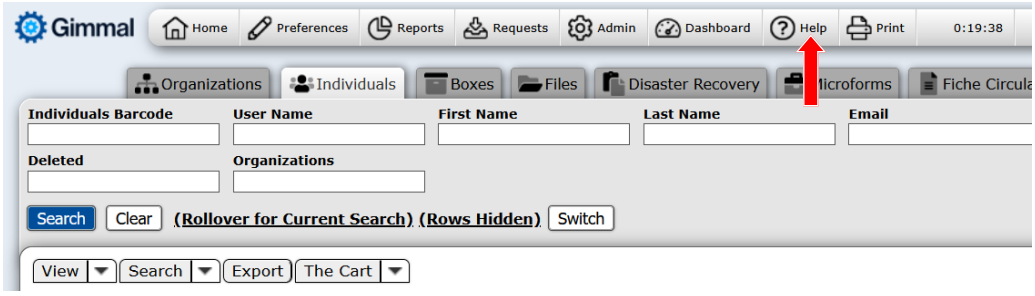


If one organization was selected on the search screen, these are the employees assigned to that organization. If more than one Organization was selected on the previous screen, click once on the barcode number to view the employee's organizational assignments.

BOXYBIT *When more than one organization is selected for a search, the results show employees assigned to any of those organizations, not necessarily assigned all of the selected organizations.*

Add, Update, or Deactivate Gimmal Individual accounts

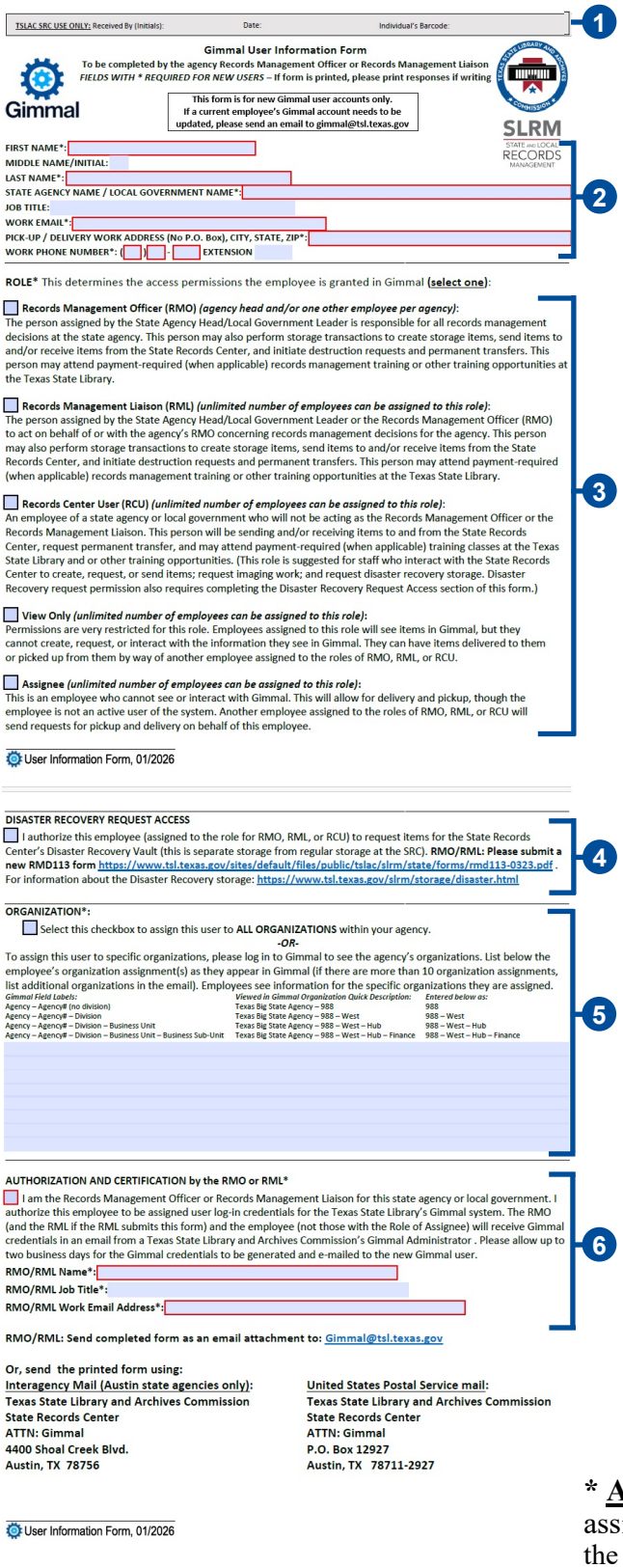
Add an employee to Gimmal



Click once on **Help** near the top of the screen. When the **Gimmal Resources** screen opens, scroll down to the Records Management Officer section, and select the preferred version (PDF or Word) of the Gimmal User Information Form.

Gimmal User Information Form

This is an illustration of both the front and back of the PDF version of the form:



TSLAC SRC USE ONLY: Received By (initials): Date: Individual's Barcode:

Gimmal User Information Form

To be completed by the agency Records Management Officer or Records Management Liaison

*FIELDS WITH * REQUIRED FOR NEW USERS* – If form is printed, please print responses if writing

Gimmal

This form is for new Gimmal user accounts only. If a current employee's Gimmal account needs to be updated, please send an email to gimmal@tsl.texas.gov

SLRM STATE and LOCAL RECORDS MANAGEMENT

FIRST NAME*:
MIDDLE NAME/INITIAL:
LAST NAME*:
STATE AGENCY NAME / LOCAL GOVERNMENT NAME*:
JOB TITLE:
WORK EMAIL*:
PICK-UP / DELIVERY WORK ADDRESS (No P.O. Box), CITY, STATE, ZIP*:
WORK PHONE NUMBER*: ( ) - EXTENSION

ROLE* This determines the access permissions the employee is granted in Gimmal (**select one**):

☐ **Records Management Officer (RMO)** ***(agency head and/or one other employee per agency)***:
The person assigned by the State Agency Head/Local Government Leader is responsible for all records management decisions at the state agency. This person may also perform storage transactions to create storage items, send items to and/or receive items from the State Records Center, and initiate destruction requests and permanent transfers. This person may attend payment-required (when applicable) records management training or other training opportunities at the Texas State Library.

☐ **Records Management Liaison (RML)** ***(unlimited number of employees can be assigned to this role)***:
The person assigned by the State Agency Head/Local Government Leader or the Records Management Officer (RMO) to act on behalf of or with the agency's RMO concerning records management decisions for the agency. This person may also perform storage transactions to create storage items, send items to and/or receive items from the State Records Center, and initiate destruction requests and permanent transfers. This person may attend payment-required (when applicable) records management training or other training opportunities at the Texas State Library.

☐ **Records Center User (RCU)** ***(unlimited number of employees can be assigned to this role)***:
An employee of a state agency or local government who will not be acting as the Records Management Officer or the Records Management Liaison. This person will be sending and/or receiving items to and from the State Records Center, request permanent transfer, and may attend payment-required (when applicable) training classes at the Texas State Library and or other training opportunities. (This role is suggested for staff who interact with the State Records Center to create, request, or send items; request imaging work; and request disaster recovery storage. Disaster Recovery request permission also requires completing the Disaster Recovery Request Access section of this form.)

☐ **View Only** ***(unlimited number of employees can be assigned to this role)***:
Permissions are very restricted for this role. Employees assigned to this role will see items in Gimmal, but they cannot create, request, or interact with the information they see in Gimmal. They can have items delivered to them or picked up from them by way of another employee assigned to the roles of RMO, RML, or RCU.

☐ **Assignee** ***(unlimited number of employees can be assigned to this role)***:
This is an employee who cannot see or interact with Gimmal. This will allow for delivery and pickup, though the employee is not an active user of the system. Another employee assigned to the roles of RMO, RML, or RCU will send requests for pickup and delivery on behalf of this employee.

User Information Form, 01/2026

DISASTER RECOVERY REQUEST ACCESS

☐ I authorize this employee (assigned to the role for RMO, RML, or RCU) to request items for the State Records Center's Disaster Recovery Vault (this is separate storage from regular storage at the SRC). **RMO/RML: Please submit a new RMD113 form** https://www.tsl.texas.gov/sites/default/files/public/tslac/slrm/state/forms/rmd113-0323.pdf . For information about the Disaster Recovery storage: https://www.tsl.texas.gov/slrm/storage/disaster.html

ORGANIZATION*:

☐ Select this checkbox to assign this user to **ALL ORGANIZATIONS** within your agency.

-OR-

To assign this user to specific organizations, please log in to Gimmal to see the agency's organizations. List below the employee's organization assignment(s) as they appear in Gimmal (if there are more than 10 organization assignments, list additional organizations in the email). Employees see information for the specific organizations they are assigned.

Gimmal Field Labels:	*Viewed in Gimmal Organization Quick Description:*	*Entered below as:*
Agency – Agency# (no division)	Texas Big State Agency – 988	988
Agency – Agency# – Division	Texas Big State Agency – 988 – West	988 – West
Agency – Agency# – Division – Business Unit	Texas Big State Agency – 988 – West – Hub	988 – West – Hub
Agency – Agency# – Division – Business Unit – Business Sub-Unit	Texas Big State Agency – 988 – West – Hub – Finance	988 – West – Hub – Finance

AUTHORIZATION AND CERTIFICATION by the RMO or RML*

☐ I am the Records Management Officer or Records Management Liaison for this state agency or local government. I authorize this employee to be assigned user log-in credentials for the Texas State Library's Gimmal system. The RMO (and the RML if the RML submits this form) and the employee (not those with the Role of Assignee) will receive Gimmal credentials in an email from a Texas State Library and Archives Commission's Gimmal Administrator . Please allow up to two business days for the Gimmal credentials to be generated and e-mailed to the new Gimmal user.

RMO/RML Name*:
RMO/RML Job Title*:
RMO/RML Work Email Address*:

RMO/RML: Send completed form as an email attachment to: Gimmal@tsl.texas.gov

Or, send the printed form using:

Interagency Mail (Austin state agencies only):
Texas State Library and Archives Commission
State Records Center
ATTN: Gimmal
4400 Shoal Creek Blvd.
Austin, TX 78756

United States Postal Service mail:
Texas State Library and Archives Commission
State Records Center
ATTN: Gimmal
P.O. Box 12927
Austin, TX 78711-2927

User Information Form, 01/2026

1. LAC SRC USE ONLY: The box at the top of the form is completed by a Gimmal administrator at the State Records Center.

2. or the personal data fields, be sure to use work information for email, address (no post office box), and phone number.

3. lect one Role for the employee. The descriptions explain the permissions for each role.

4. elect this checkbox if the employee will request Disaster Recovery items to/from the DR Vault at the SRC. Send the RMD 113 form to the SRC manager if this is selected.

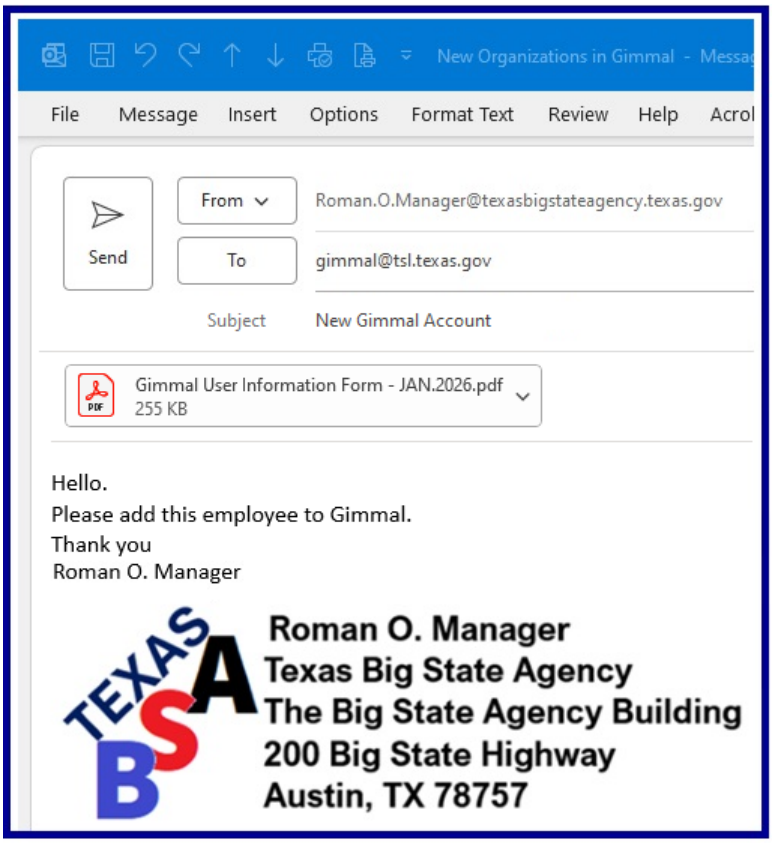
5. ganizations. Select the checkbox to assign the employee to all agency organizations **or** use the data fields to assign the employee to specific organization(s). Format the data as shown in the examples. Refer to Gimmal for how the Organizations appear. Employees access information only for the specific organization(s) they are assigned (*See below).

6. T RMO or RML completes the Authorization and Certification by the RMO or RML section.

When the form is complete, follow the instruction at the bottom of this second page for how to send the form to the Texas State Library.

* **About Organization assignment**: If a user is assigned to a division, they cannot see items for the division's business unit without being assigned to that specific division's business unit. Likewise, a user assigned to a division and a division's business unit cannot see items assigned to the business unit's business sub-unit unless assigned to that specific business sub-unit.

Email the Gimmal User Information form



When the form is complete, attach it to an email and send to **gimmal@tsl.texas.gov**
After the account is created, the employee will receive an email with the login credentials and a temporary password that the employee is required to change on the first login to Gimmal. The RML and/or the RMO receive(s) a copy of the credentials as confirmation that the Gimmal account has been created. The RMO is included in the reply if the RML sent the form.

Update information for an employee's Gimmal account

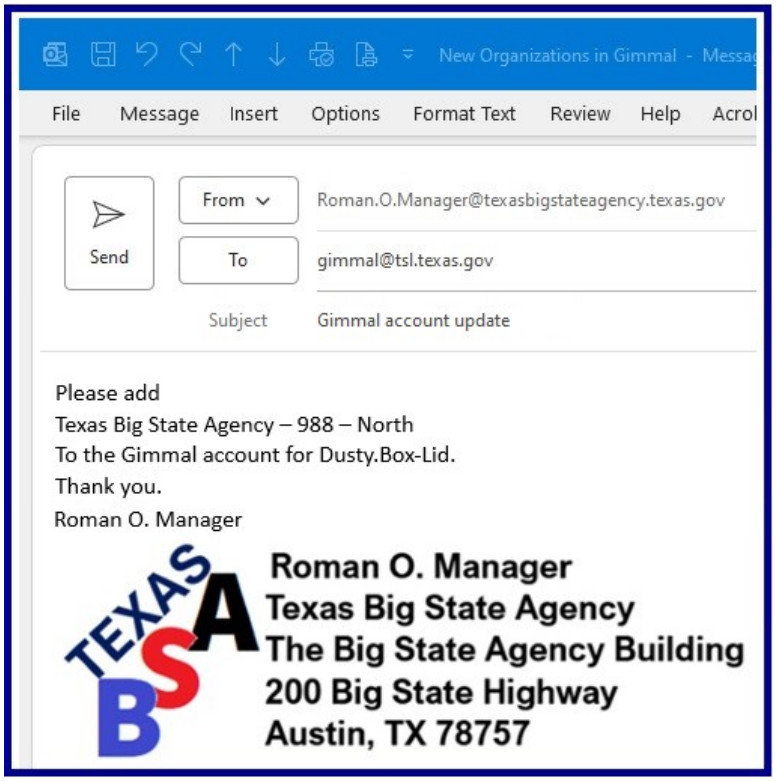
To update an employee's Gimmal account, the RMO or RML must send an email to **gimmal@tsl.texas.gov .** If the email comes from someone who is not the RMO or RML in Gimmal, the update will not be processed.

Provide the employee's Gimmal username when requesting an account update. Due to previous name changes or other reasons, the Gimmal username may be different from the employee's name. The username cannot be updated; however, if the name is updated, how it appears in Gimmal (in the Current Location field, for example) will reflect the name update.
The person requesting the update will receive a notification when the process is complete. All employees included on the initial email will be replied when the update is complete. If the RML makes the request, the RMO is copied on the reply.

Some other possible updates to Gimmal customer accounts:

- New job title, work address, work email address, and or phone number
- Different Role assignment
- Disaster Recovery Request Access added or removed from the account (RMD 113 form also needs to be completed for this)
- Add/remove organizations
- Disaster Recovery Request Access authorization

Send an email to update information for an employee's Gimmal account



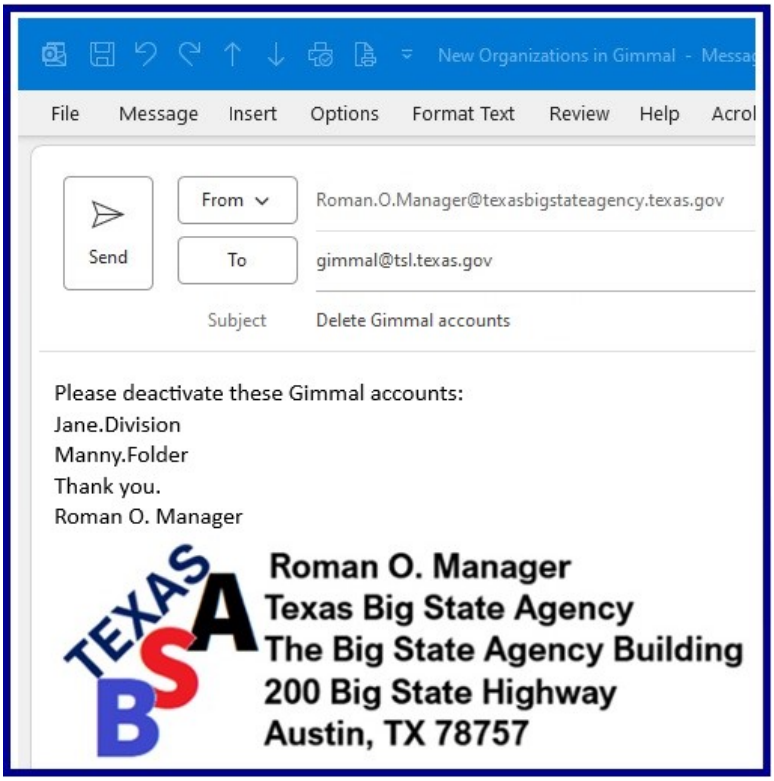
To update an employee's Gimmal account, the RMO or RML must send an email to **gimmal@tsl.texas.gov .** If the email comes from someone who is not the RMO or RML in Gimmal, the update will not be processed.

Provide the employee's Gimmal username when requesting an account update. Due to previous name changes or other reasons, the Gimmal username may be different from the employee's name. The username cannot be updated; however, if the name is updated, how it appears in Gimmal (in the Current Location field, for example) will reflect the name update.
The person requesting the update will receive a notification when the process is complete. All employees included on the initial email will be replied when the update is complete. If the RML makes the request, the RMO is copied on the reply.

Some other possible updates to Gimmal customer accounts:

- New job title, work address, work email address, and or phone number
- Different Role assignment
- Disaster Recovery Request Access added or removed from the account (RMD 113 form also needs to be completed for this)
- Add/remove organizations
- Disaster Recovery Request Access authorization

Deactivate an employee's Gimmal account



It is the responsibility of the RMO/RML to notify the Gimmal administrator at the Texas State Library when an employee no longer needs access to Gimmal. Remember, any Gimmal user can access Gimmal on any device with a web browser; so, deactivating an employee's Gimmal account is important. To deactivate a Gimmal account, please send an email to **gimmal@tsl.texas.gov** to request the Gimmal account to be deactivated.

When the Gimmal administrator receives the email to deactivate the Gimmal account, it is understood the account is to be deactivated at that time. Please do not send the request to deactivate a Gimmal account prior to the time it is to be deactivated.

The person requesting the deactivation will receive a notification when the process is complete. If the RML makes the request, the RMO is copied on the reply.

NOTES

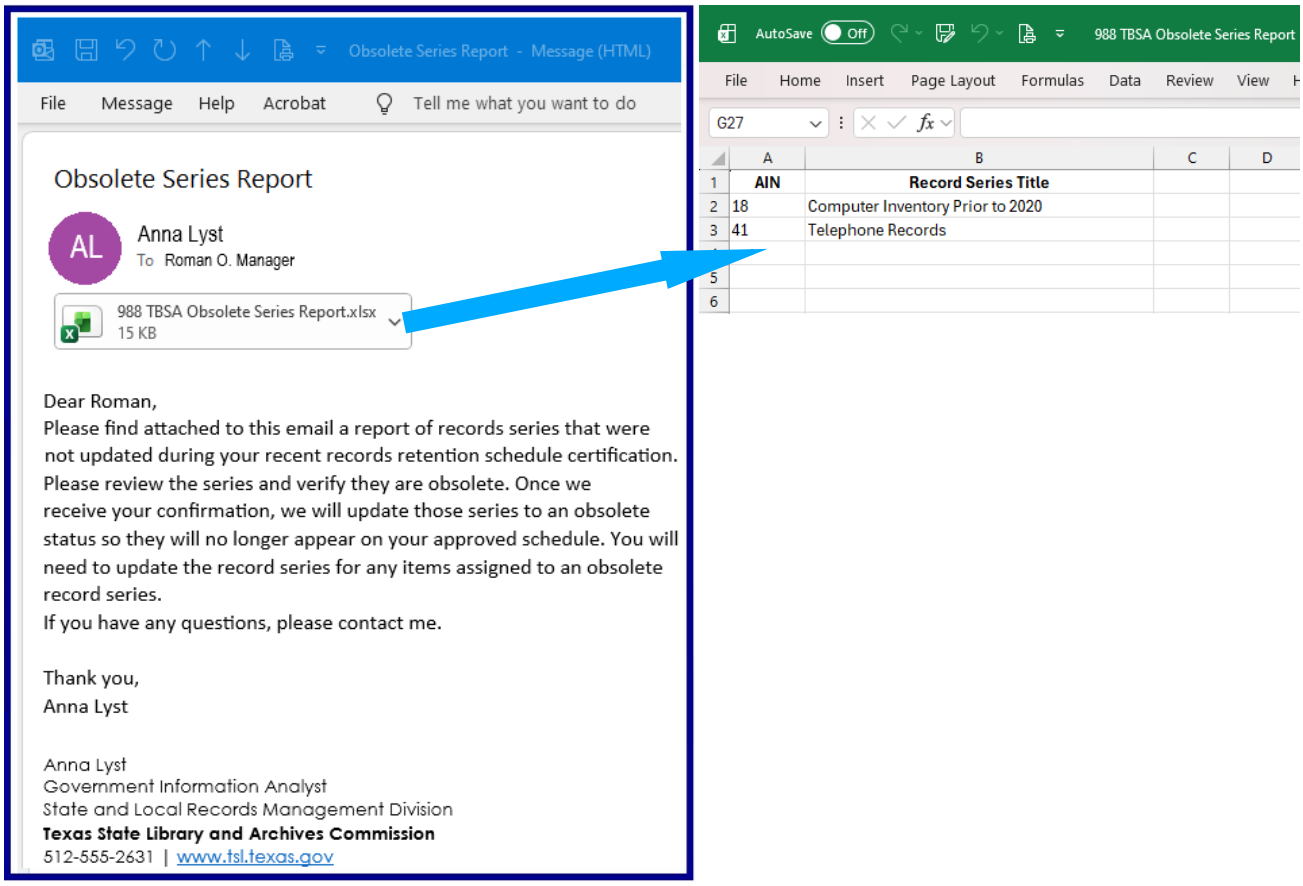
NOTES

Update Gimmal Items Assigned to Obsolete Records Series

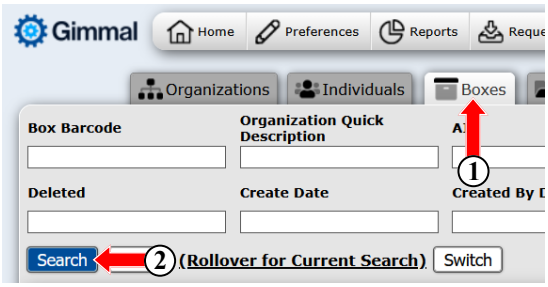
When an agency's records retention schedule is approved, recertified, or amended, a Government Information Analyst (GIA) at the Texas State Library and Archives Commission (TSLAC) updates the retention schedule information and the Approval Status field on the Records Series tab in Gimmal. Items on the Boxes tab and Microforms tab in Gimmal that are assigned to any obsolete record series are not updated by the TSLAC GIA. The Record Series no longer on the retention schedule is noted in the Approval Status field as Obsolete in Gimmal. When an approved record series is selected to replace an obsolete record series, **the agency's Records Management Officer (RMO) or Records Management Liaison (RML) is responsible for updating all Gimmal box and/or microform items assigned to the obsolete record series.** Items should be reassigned to the approved record series as soon as possible. Agency employees assigned to the Gimmal roles Records Center User or View Only cannot see items in Gimmal assigned to any obsolete record series. The TSLAC GIA corresponds to the agency's Records Management Officer (below left image) with an excel document attachment (below right image) for the Obsolete Record Series Report. The report lists any Agency Item Number (AIN)/Record Series Title removed from the Retention Schedule. The RMO/RML uses this report as a guide to see what box/microform items that will need to be updated in Gimmal. Not every item on this report may have boxes/microforms in Gimmal.

It will be useful later to have a printout of the Obsolete Series Report so be sure to print it.

Obsolete Series Report email and worksheet



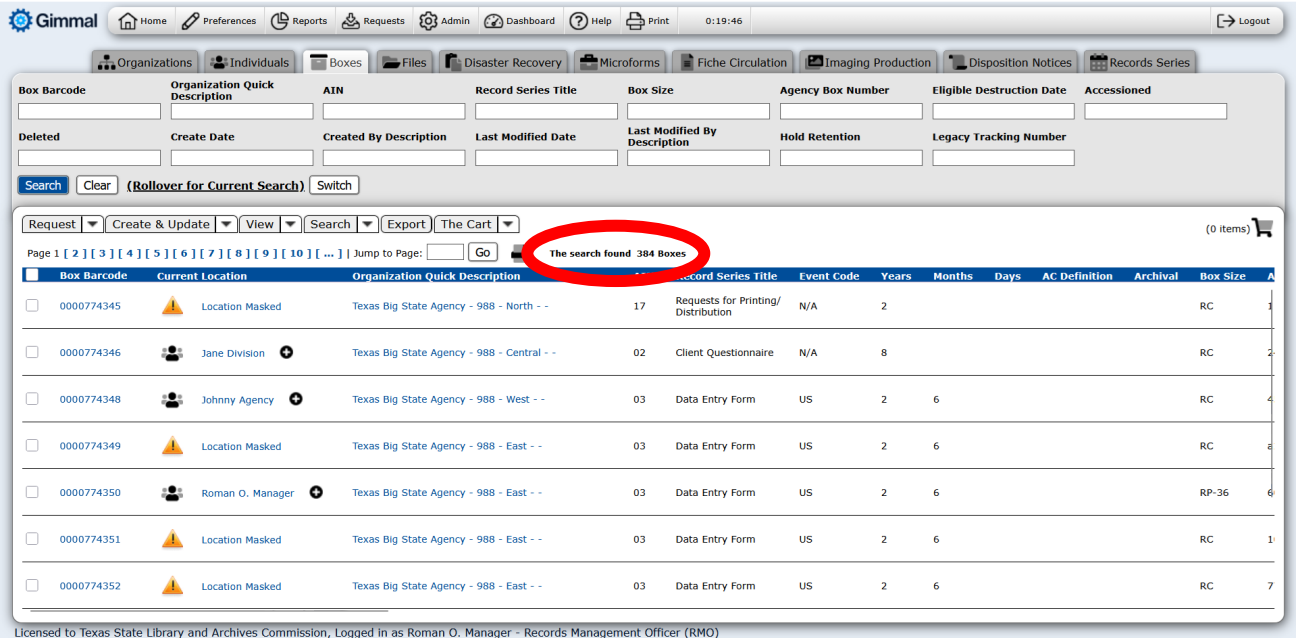
Create an Agency Item Number (AIN) list for Gimmal boxes (or microforms)



The first step for the RMO or RML to update Gimmal items assigned to an obsolete record series is to create a list of Agency Item Numbers (AIN) for items on the Boxes tab and the Microforms tab in Gimmal. This instruction guide provides the steps for the Boxes tab, but the same steps are used for the Microforms tab. **Please be sure to check both tabs in Gimmal.**

Log in to Gimmal and click once **(1)** on the **Boxes** tab to start the process to generate a list of all box items. Click once **(2)** on the **Search** button in the quick search area to find all boxes.

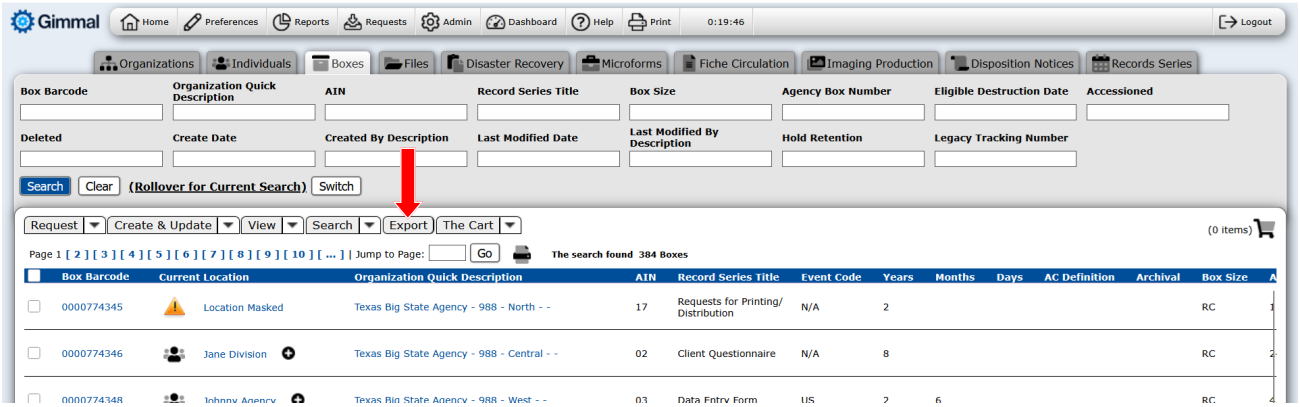
Search Results



If the search results in items populating the Boxes home page grid (like the above example), continue with the following instructions until instructed to check for microforms. If no search results populate on the Boxes home page, that means there are no items for the agency on the Boxes tab; be sure to follow the previous steps to check for items on the Microforms tab.

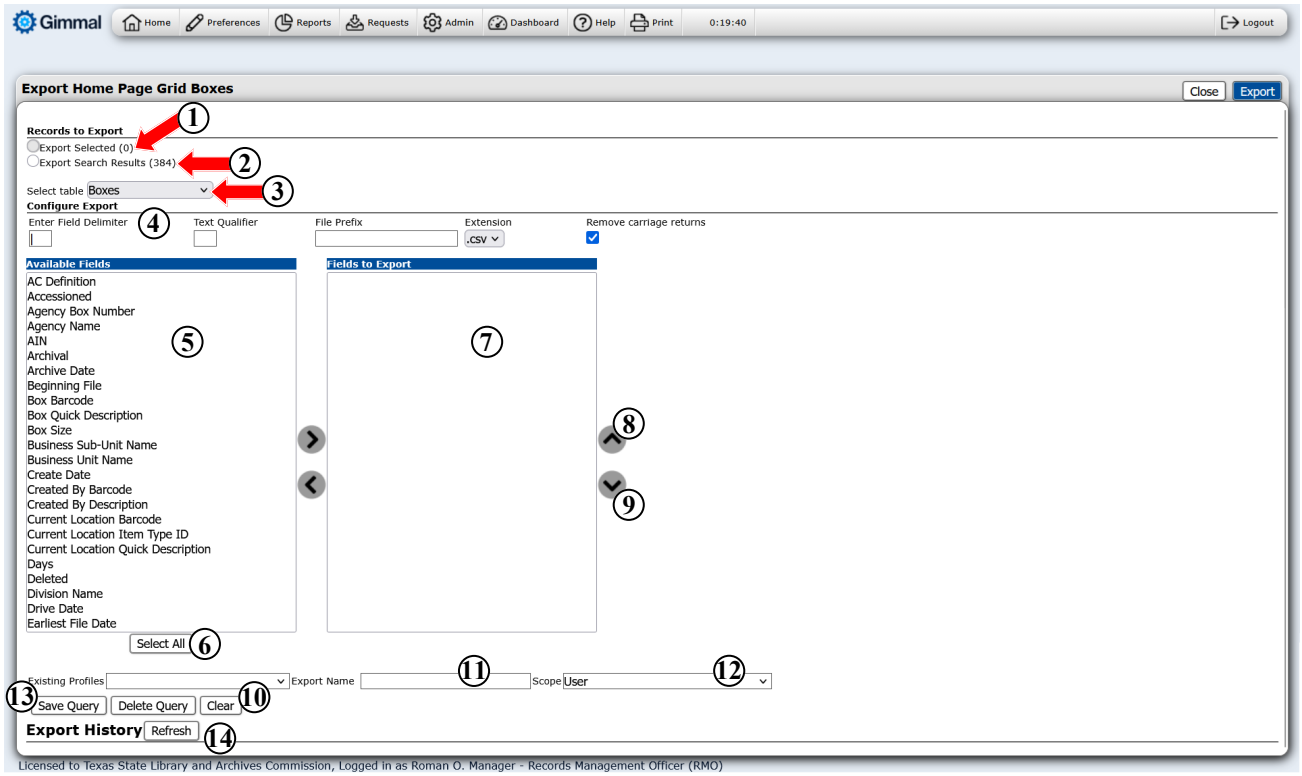
This search example found **384 items** on the Boxes tab. This means there are 384 box items in Gimmal for the Texas Big State Agency.

Export from Home Page



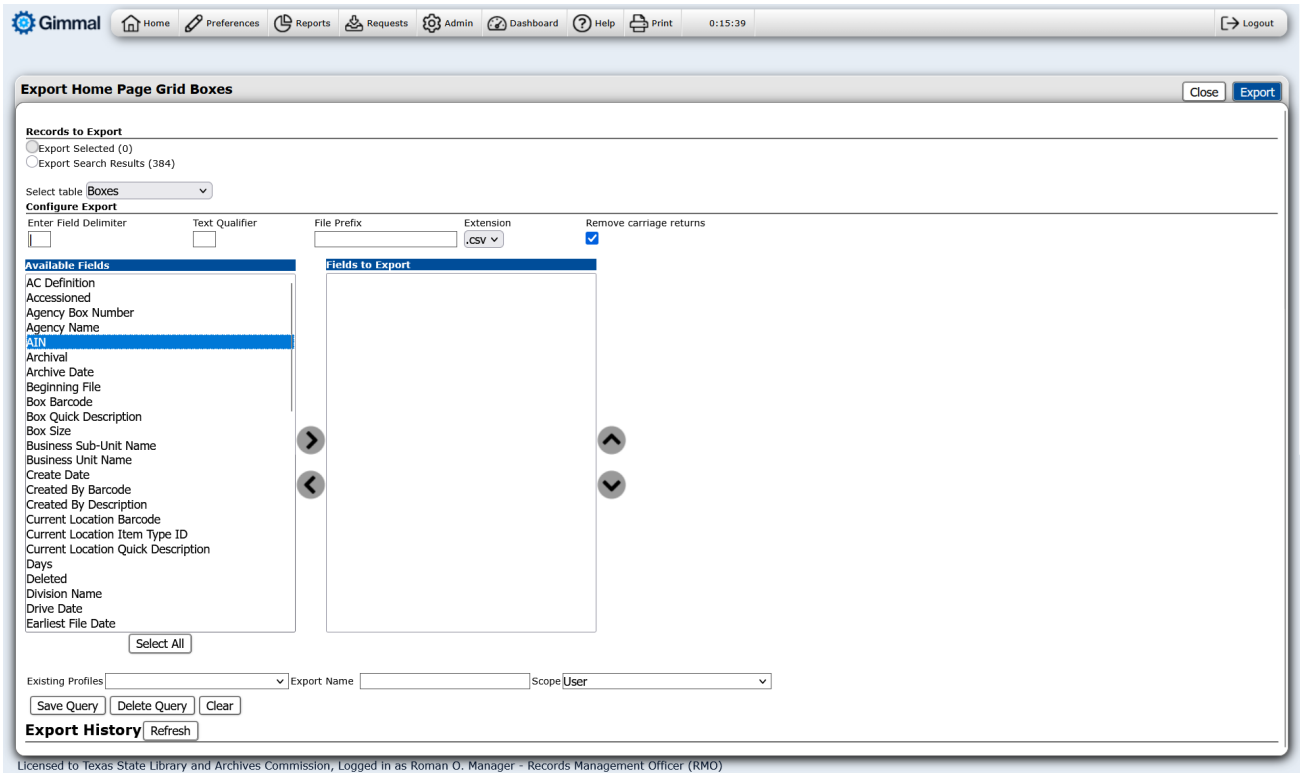
The next step is to Export. Do not select any of the checkboxes to the left of the box barcode numbers since information from all items will be exported. Click once on **Export**.

Export Home Page Grid



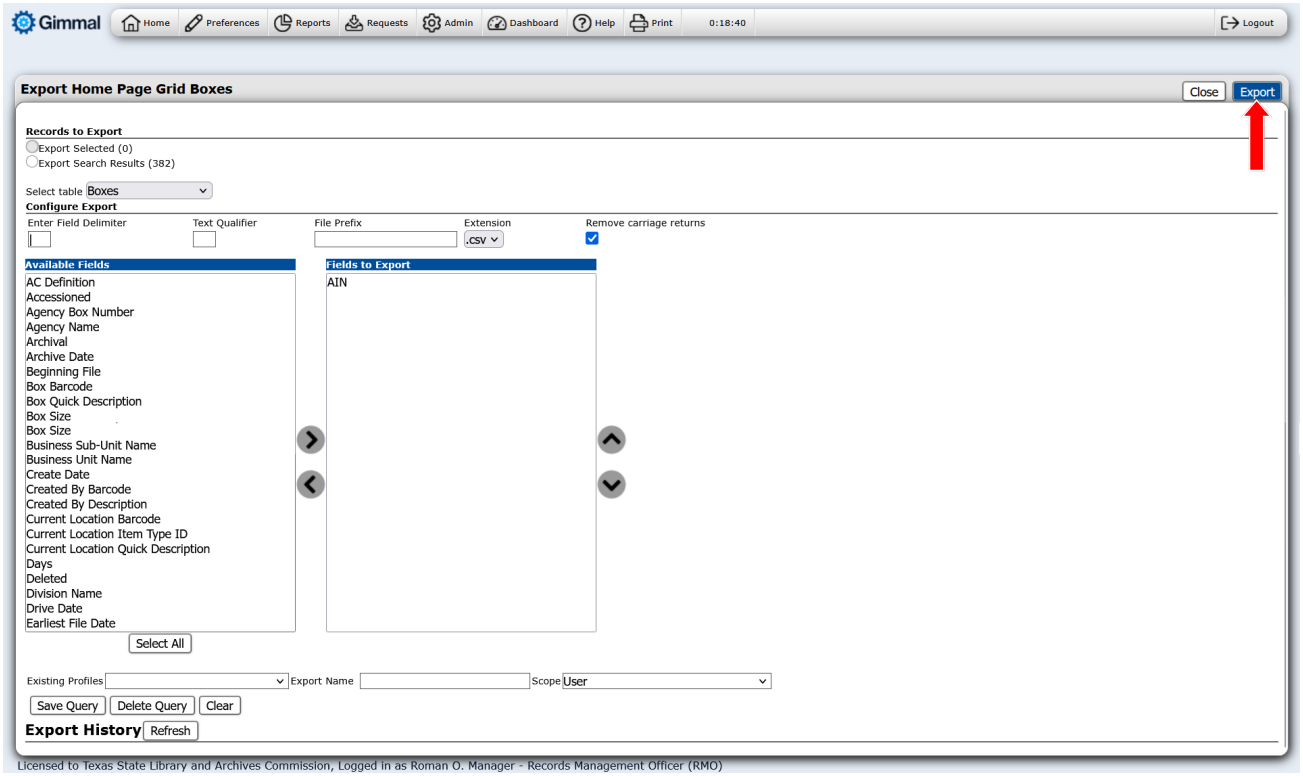
1. **Export Selected:** When Export Selected (0) is selected (shown here as an unselected circle), the number of checkboxes selected on the Home Page Grid appears here and will export information for only those items.
2. **Export Query:** When Export Search Results (204) is selected (shown here as an automatically selected white circle — or click it to make it more obvious—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. **Export History:** Recent exports are shown here until they are deleted.

Select AIN field label from Available Fields column



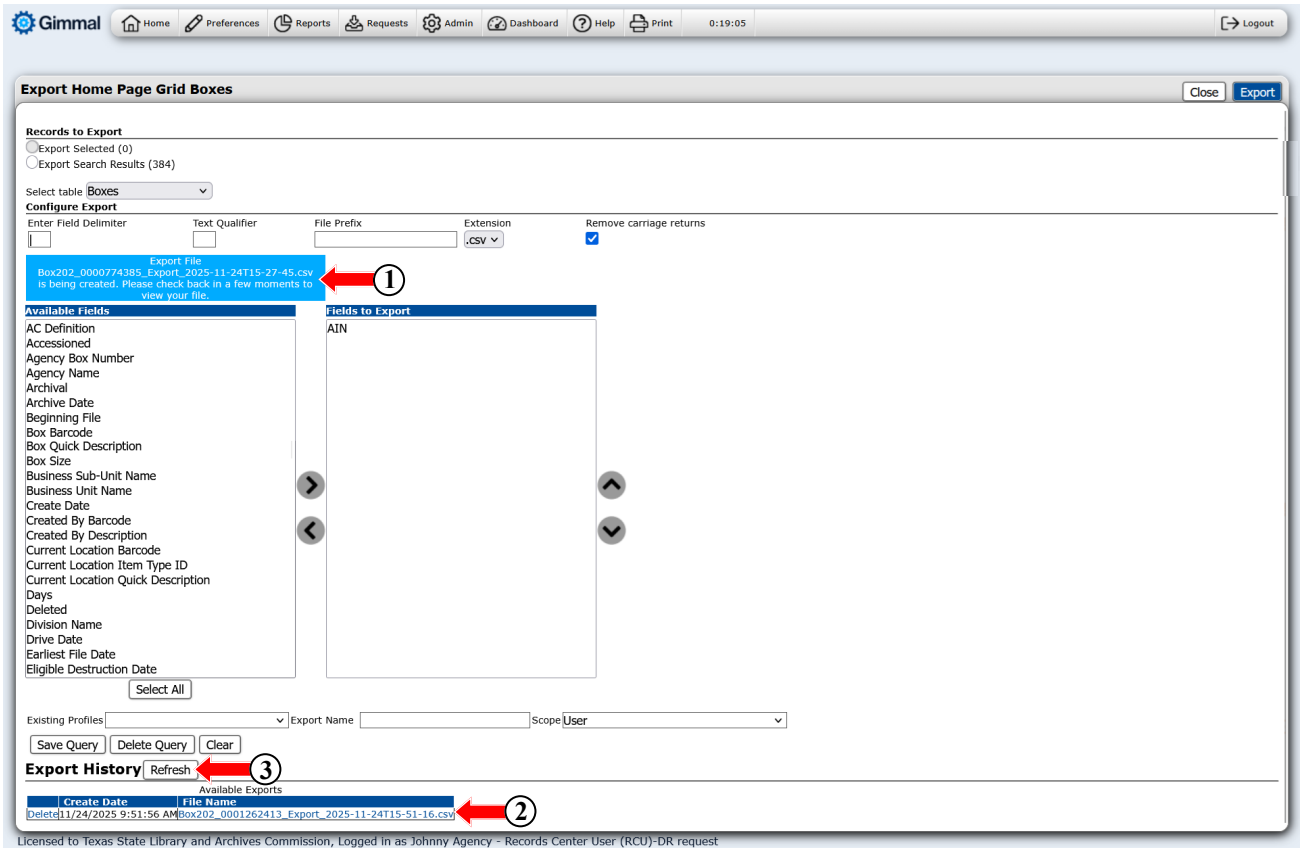
Double click on the **AIN** field label to move it to the **Fields to Export** column.

AIN field populates in Fields to Export column



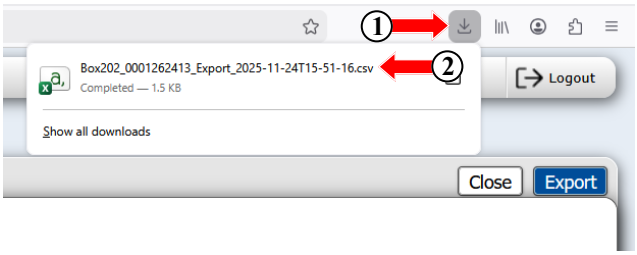
Click once on the **Export** button at the top right.

Export screen, blue popup message, Refresh, select file



A blue **Export File** dialogue box **(1)** will show above the field columns showing the name of the file being created. When the file is created it will be listed in **Available Exports** menu **(2)**. If it is not there, click the Refresh button **(3)** until the file shows. When several fields are being exported for a large number of items, the process might take a bit of time to process.

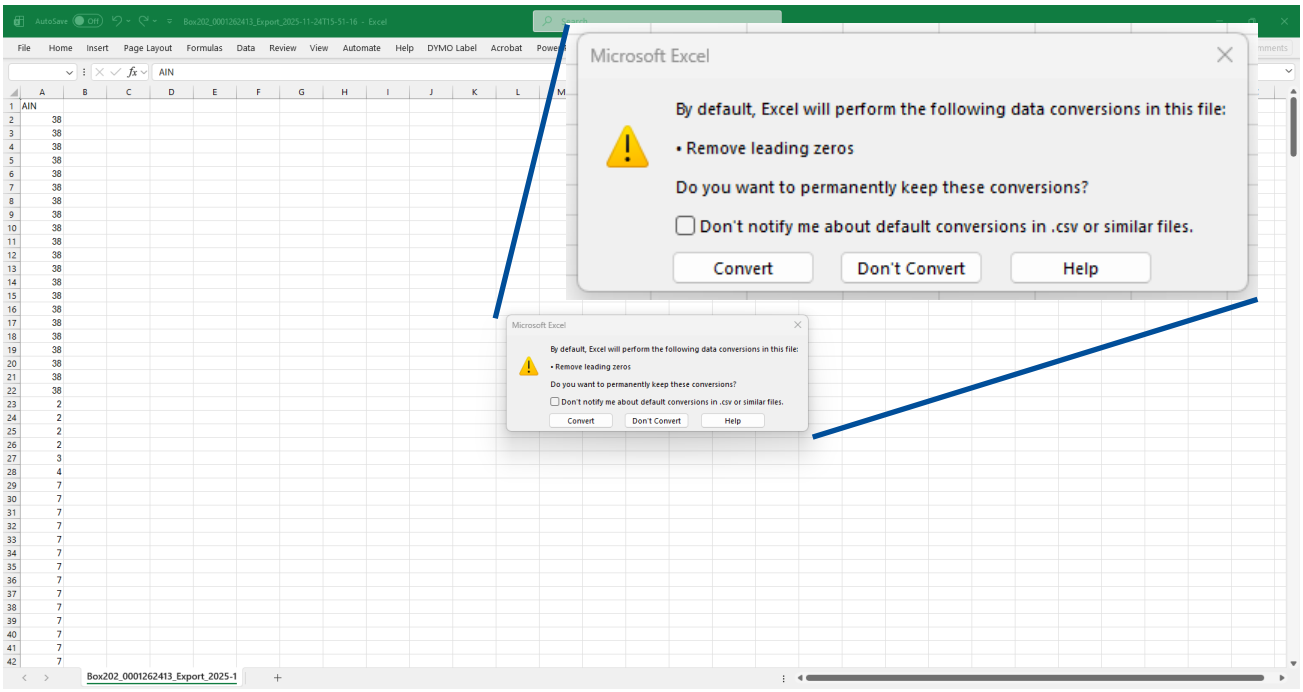
Open the file



When the file is clicked at the bottom of the screen, the file will show in a download menu at the top of the screen. The down arrow **(1)** might need to clicked to view the file. When the file is shown, click once on the file name **(2)** to open the file in Excel. If there is more than one download item, the top one is the one to click.

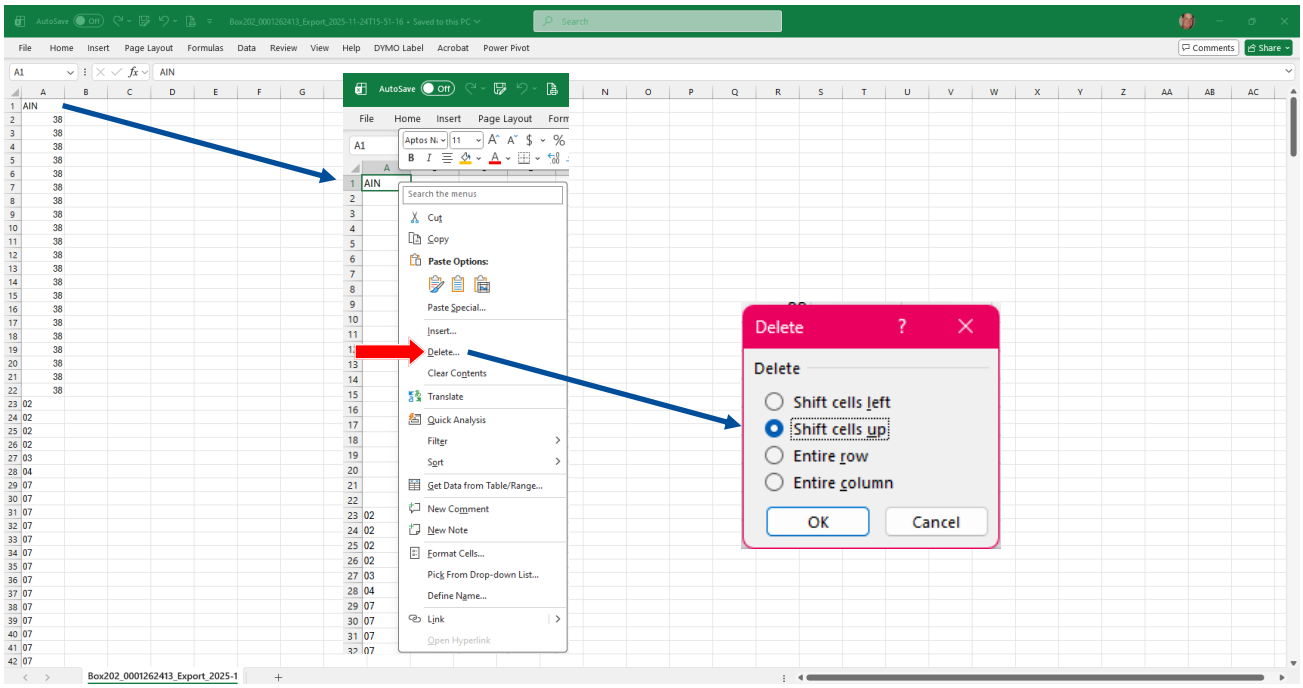
BOXYBIT *If download information does not display, a computer setting might need to be adjusted. Contact the agency IT department to assist with this.*

The file in Excel, select Don't Convert



When the Excel file opens, a popup message shows. Click once on **Don't Convert**. This will stop Excel from omitting leading zeros or zeros at the end of a decimal part of the AIN. The image on the follow page will show the single-digit items starting on line 23 have a leading zero. That needs to be preserved because that is part of the AIN on the Retention Schedule.

Format the Excel worksheet

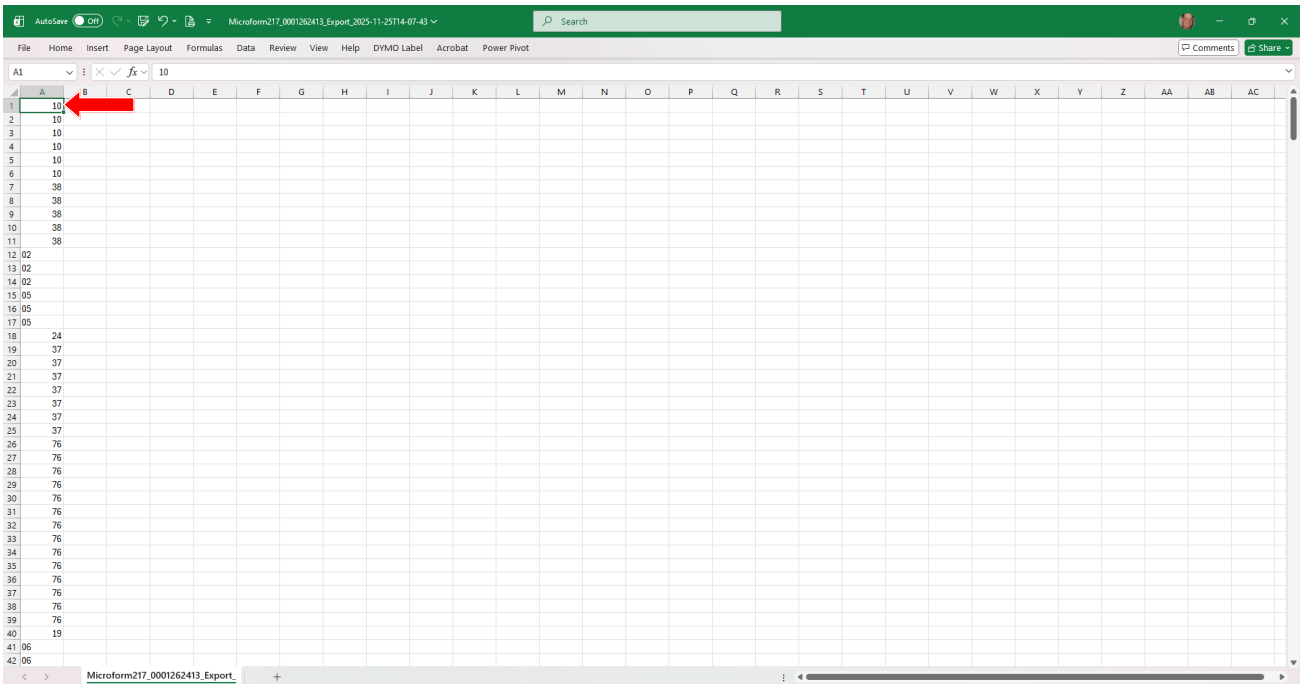


The **AIN** data field does not need to be there. Right click the mouse in the **AIN** data field. Click once on **Delete** in the dropdown menu. On the **Delete** popup, click once on the radio button for **Shift Cells Up** then click once on **OK**.

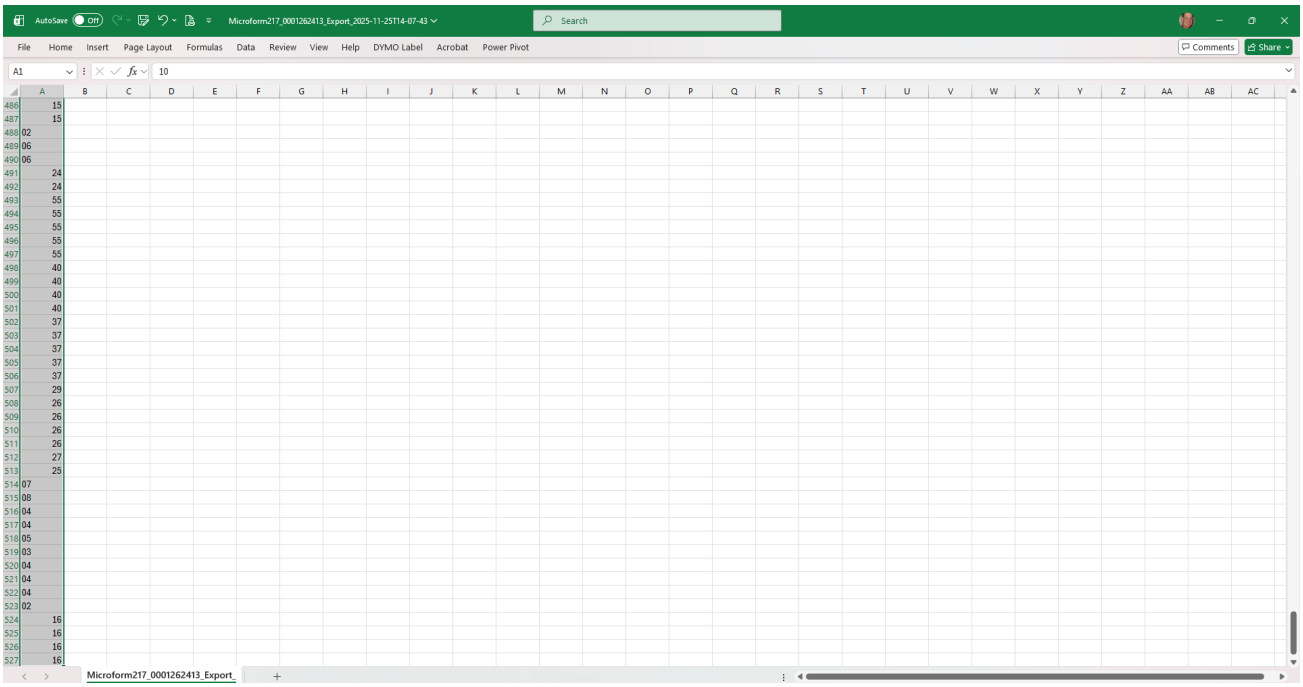
At this point, go back to Page 270 and complete the same process for Microforms (if needed). Then, after completing the steps to the above, go to the next page.

<u>If there is no information for microforms after pasting information for boxes, continue Page 279.</u>

Copy data from the Microforms worksheet

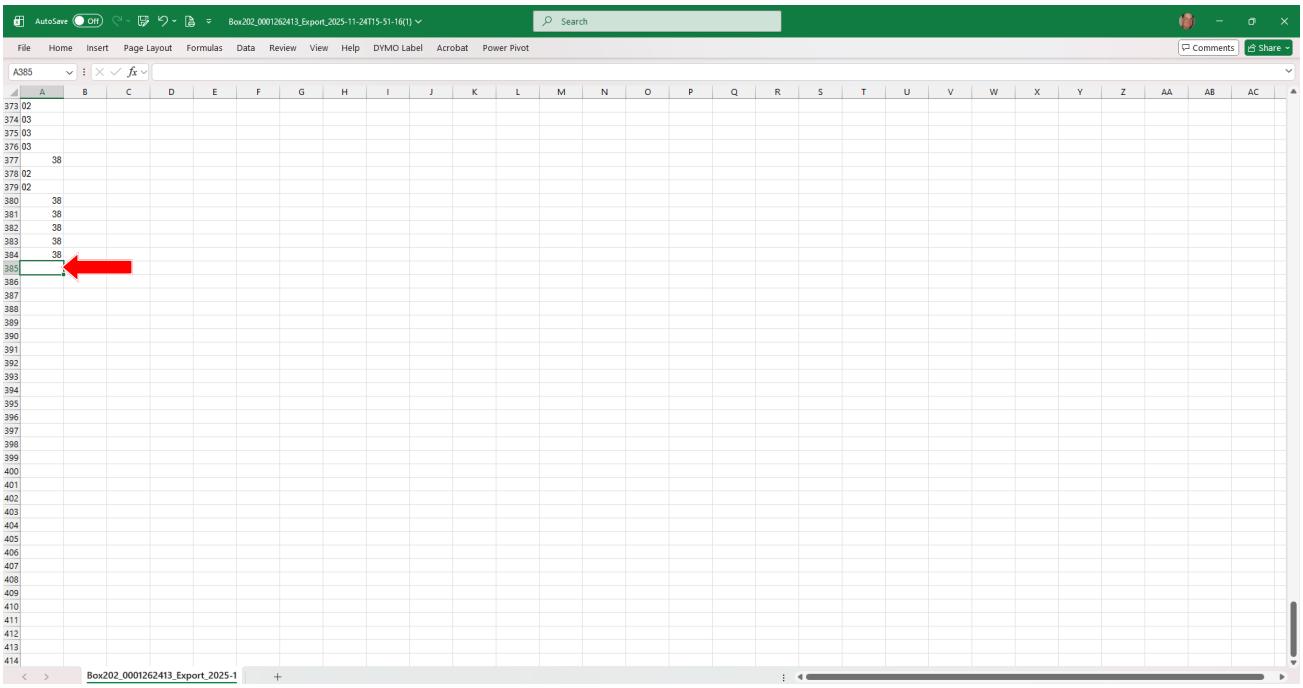


After AIN is deleted (as explained on the previous page), click on the any data cell in the first column.

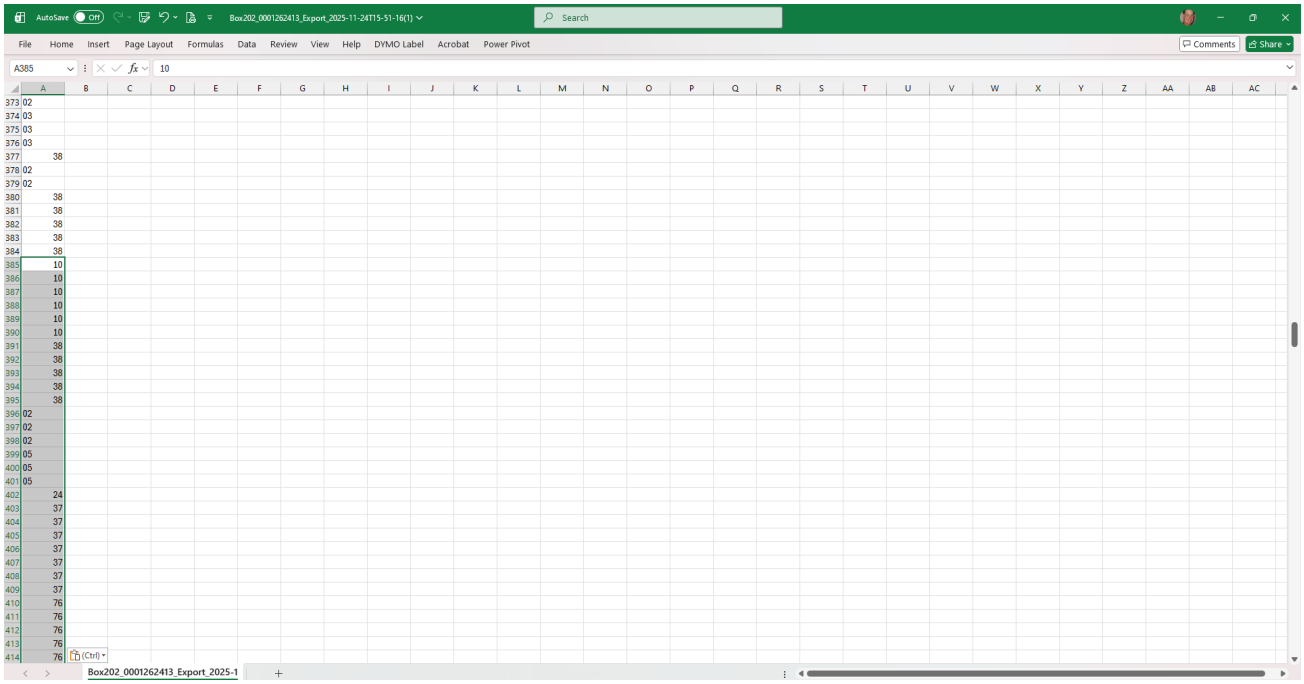


Next, select the data. To do this:
Hold down **CTRL** on the keyboard
Press **A**
The column of data will turn gray. This means the data items are selected.
Next, copy the data.
Hold down **CTRL** on the keyboard
Press **C**

Paste data from the Microforms worksheet to Boxes worksheet

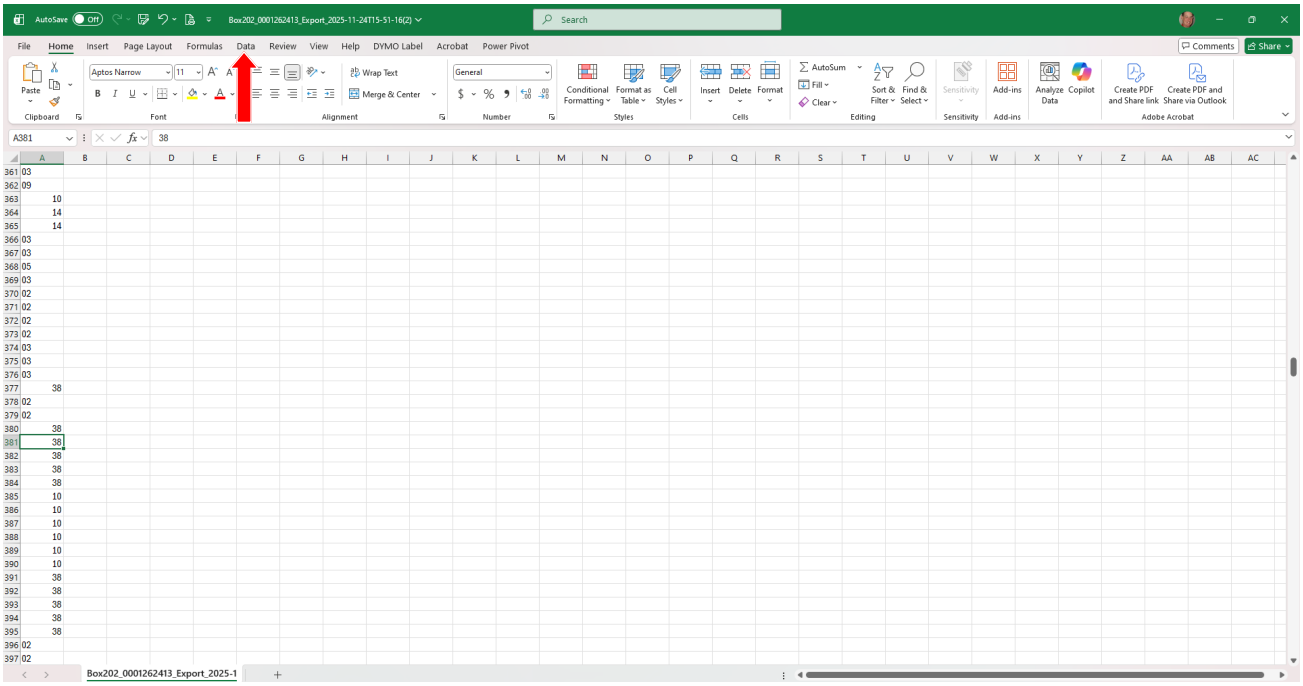


Return to the Boxes worksheet to paste the data from the Microforms worksheet.
Click once in the first empty cell below the last AIN.
Hold down **CTRL** on the keyboard.
Press **V** to paste the data.



This is how the information will look when the Microforms information is pasted onto the Boxes worksheet. Return to the Microforms worksheet and close it. It does not need to be saved.

Remove duplicates

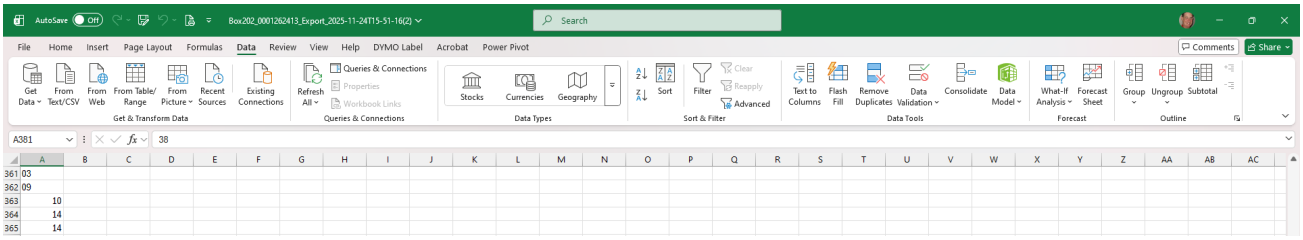


The goal of this part of the process is to get a simple list of AIN assigned to boxes and or microforms. The duplicate data cells need to be deleted.

After pasting is complete, click once on any data field if a set of information is selected. AIN 02, 03, 10 , 14, and 38 appear multiple times in this illustration. The duplicate cells need to be removed so they appear only once.

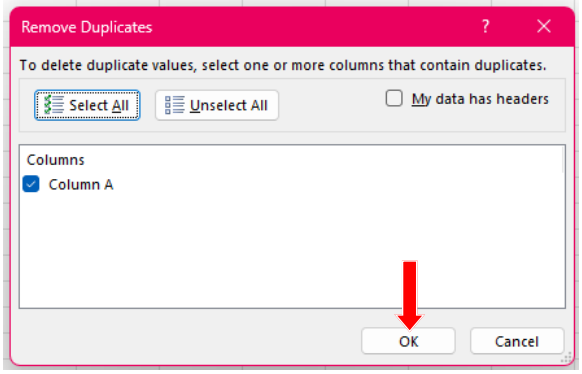
Click once on **Data** at the top of the screen.

Remove duplicates: Data Tools tab

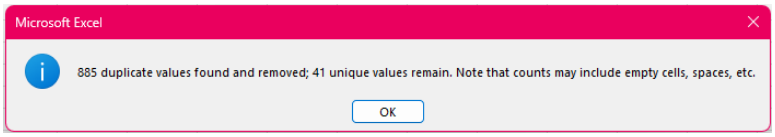


Click once on **Remove Duplicates** in the **Data Tools** section. Depending on the version of Excel, only the icon might be shown.

Remove duplicates: Dialogue box and confirmation

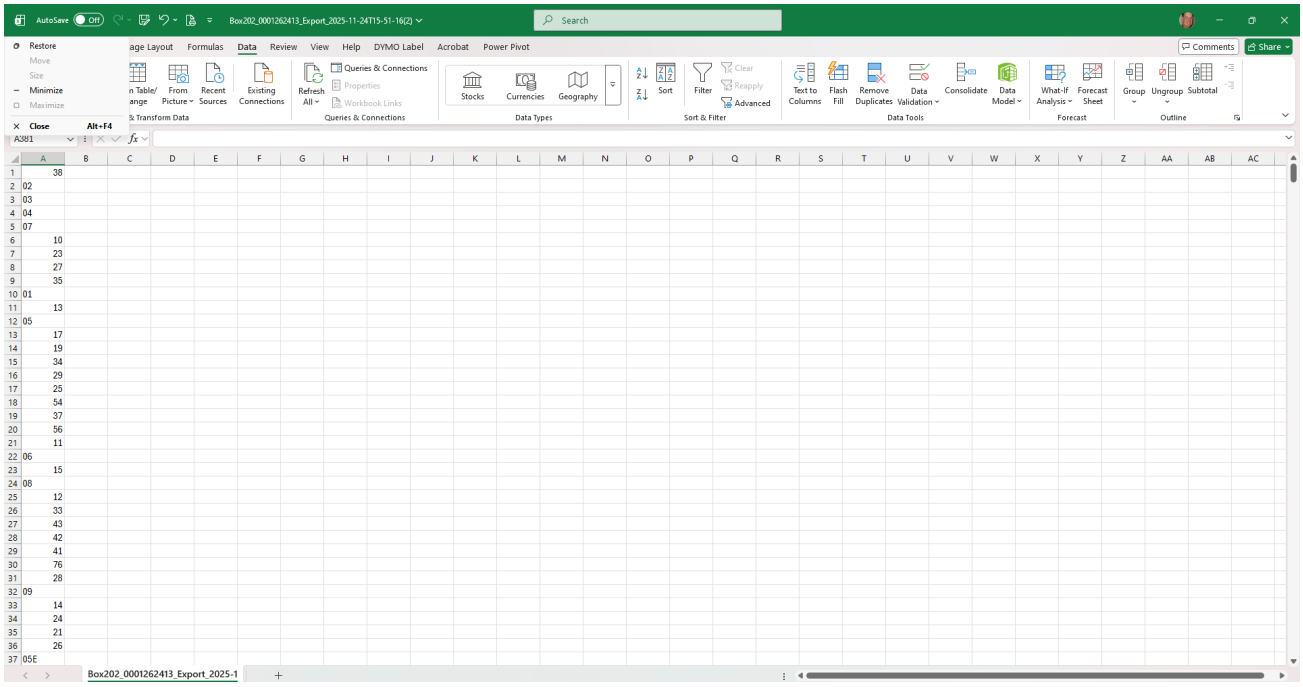


An information popup like this will show. Click once on **OK**.
BOXYBIT *If this popup does not display, popup blockers might be activated. Contact the agency IT department to adjust popup settings.*



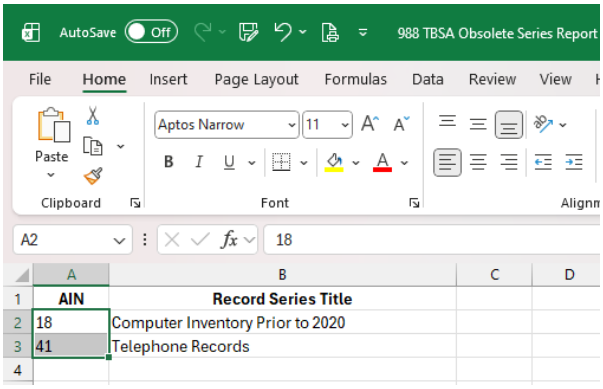
After clicking OK, another popup confirms how many duplicates were removed and how many unique Agency Item Numbers remain. Click once on **OK**.

Remove duplicates: The result



The end result of this is the list now has no duplicates.

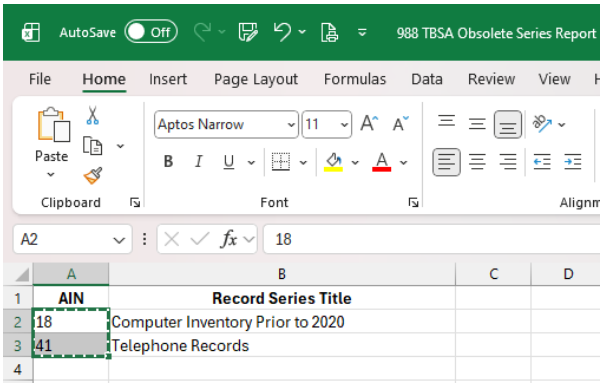
Extract from the Obsolete Series Report



Return to the Obsolete Series Report the agency's TSL analyst sent to the agency records management officer. Copy the information from the AIN column:

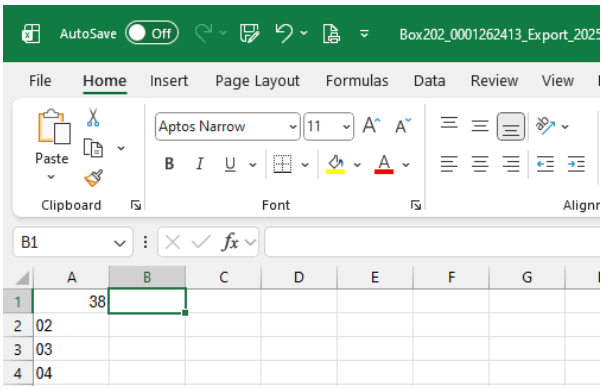
Select the data fields. The selected data fields will have a solid line around them.

On the keyboard, hold down **CTRL** and pass the letter **C**.



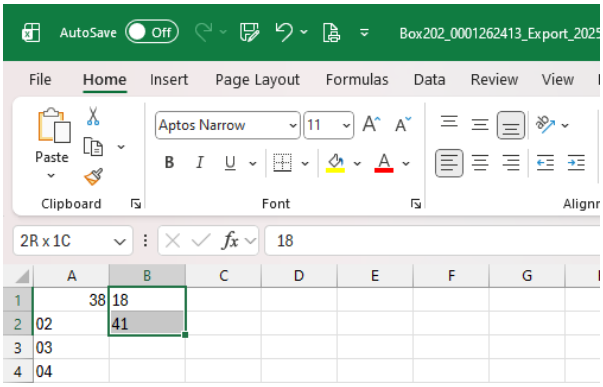
The copied data fields will have a dashed line around them. Do not click anywhere on the worksheet, doing that will uncopy the information. Go back to the other worksheet with the AIN listed without duplicates.

Paste Agency Item Numbers from Obsolete Series Report into boxes worksheet

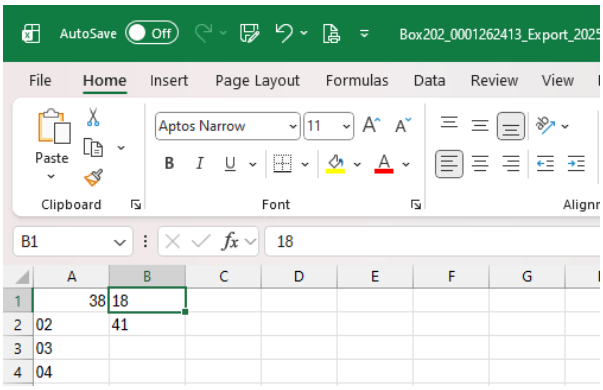


Scroll to the top of the worksheet and click once in the first cell of the next column. This is where the information from the Obsolete Series Report is to be pasted. On the keyboard, hold down **CTRL**. Press the letter **V**.

Conditional Formatting to find AIN with items assigned

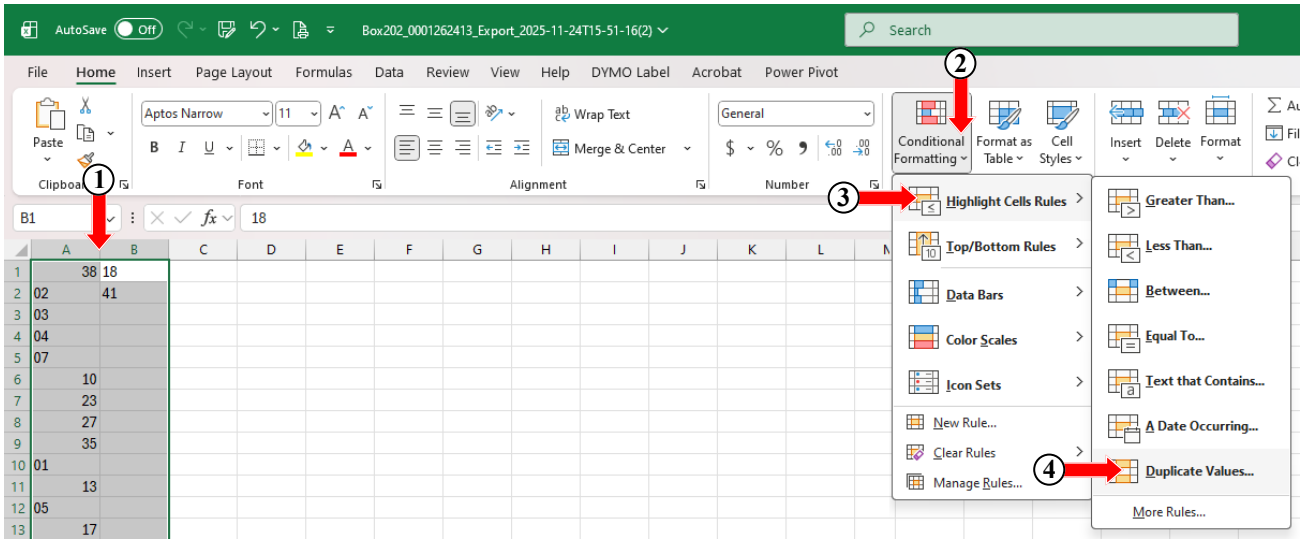


As a reminder, the first column has AIN assigned to items in Gimmal.
The second column has AIN that were pulled from the Obsolete Series Report because those AIN no longer appear on the approved Retention Schedule.



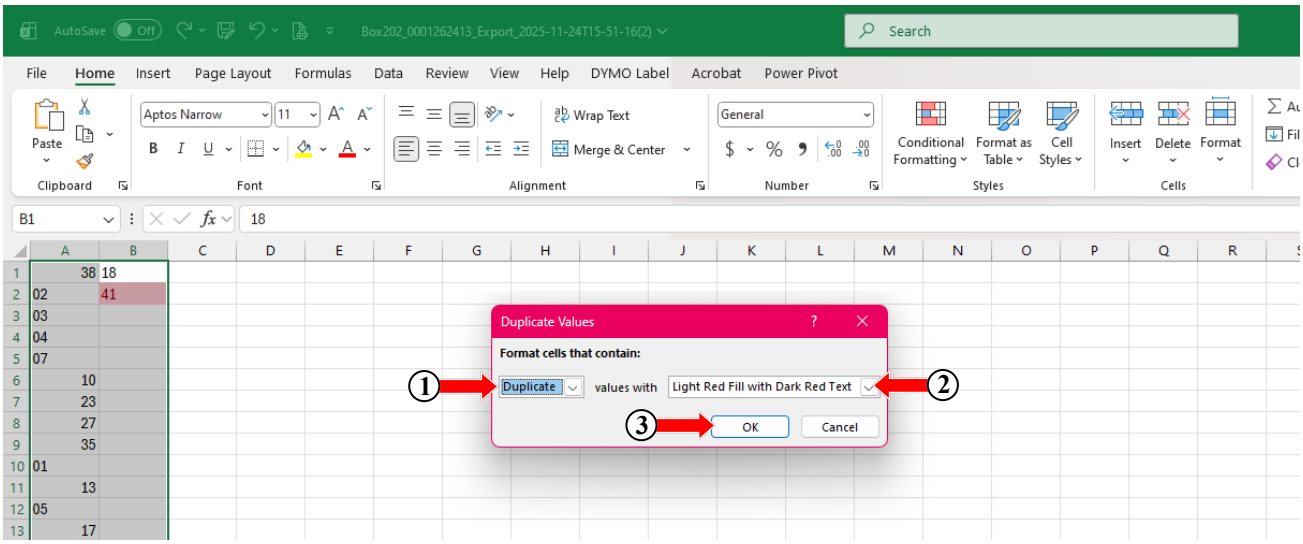
Click once on any data field with information.
On the keyboard, hold down **CTRL**.
Press the letter **A**. This will select all of the data fields in the two columns (as seen in the next illustration). It is okay if some data fields without information get selected.

Conditional Formatting: Select Duplicate Values



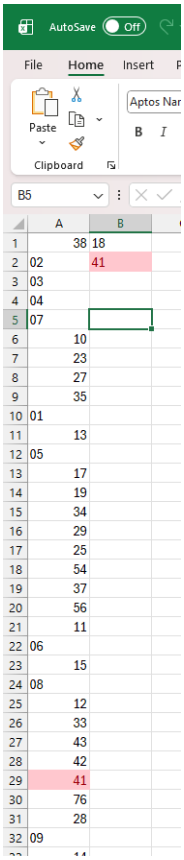
This step is going to compare the information in the two columns **(1)** to find duplicates. This will identify which AIN have items assigned and which don't have items assigned.
Click once **(2)** on **Conditional Formatting**. In the dropdown menu hover the mouse **(3)** over **Highlight Cells Rules**. On the side menu, click once **(4)** on **Duplicate Values**.

Duplicate Values popup



In the **Duplicate Values** popup, make sure the left dropdown **(1)** has **Duplicate** selected. The right dropdown **(2)** is where the formatting can be selected for the data cells that have duplicate values.
Click once **(3)** on **OK** when finished with the popup.

Which AIN have items assigned in Gimmal

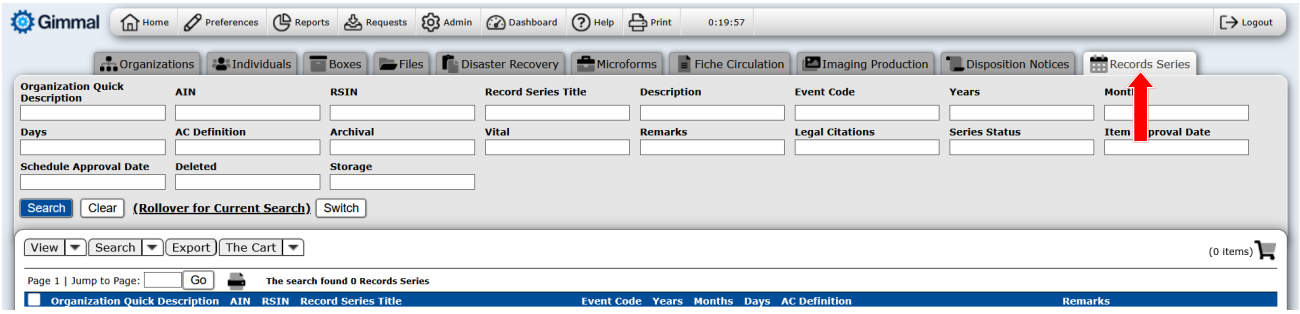


When an AIN is designed with highlight in the second column, that indicates it has items assigned in Gimmal. In the above illustration, of the two AIN that were on the Obsolete Series Report, only AIN 41 has items assigned in Gimmal. AIN 18 has no items assigned to it because it was not found in the first column and it does not get a highlight.

It was suggested earlier to print the Obsolete Series Report. Note on the printout which AIN have storage assigned at the SRC.

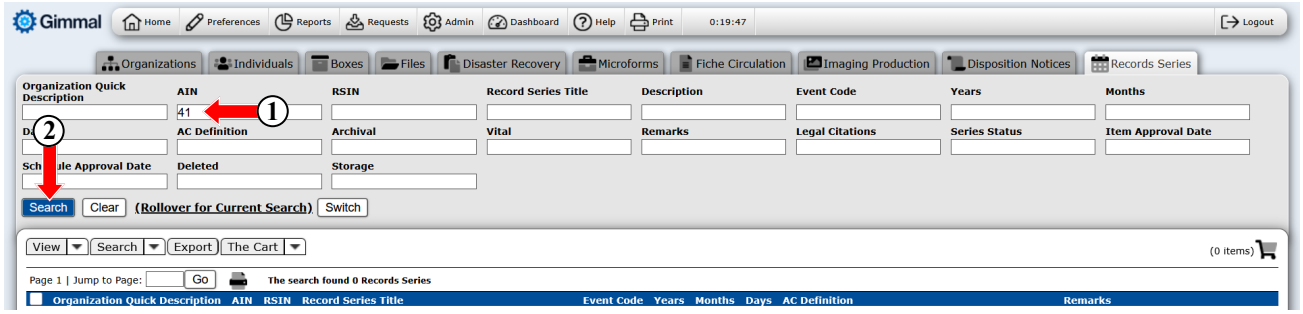
Return to Gimmal.

Research on the Records Series tab to determine items assigned



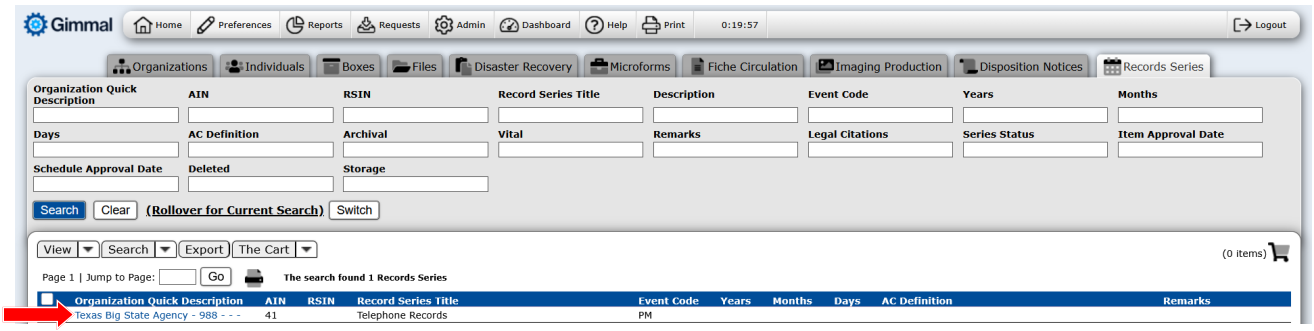
In Gimmal, it needs to be determined which AIN have items on either or both the boxes tab or/and the microforms tab. Click once on the **Records Series** tab in Gimmal.

Find the first AIN with items assigned in Gimmal



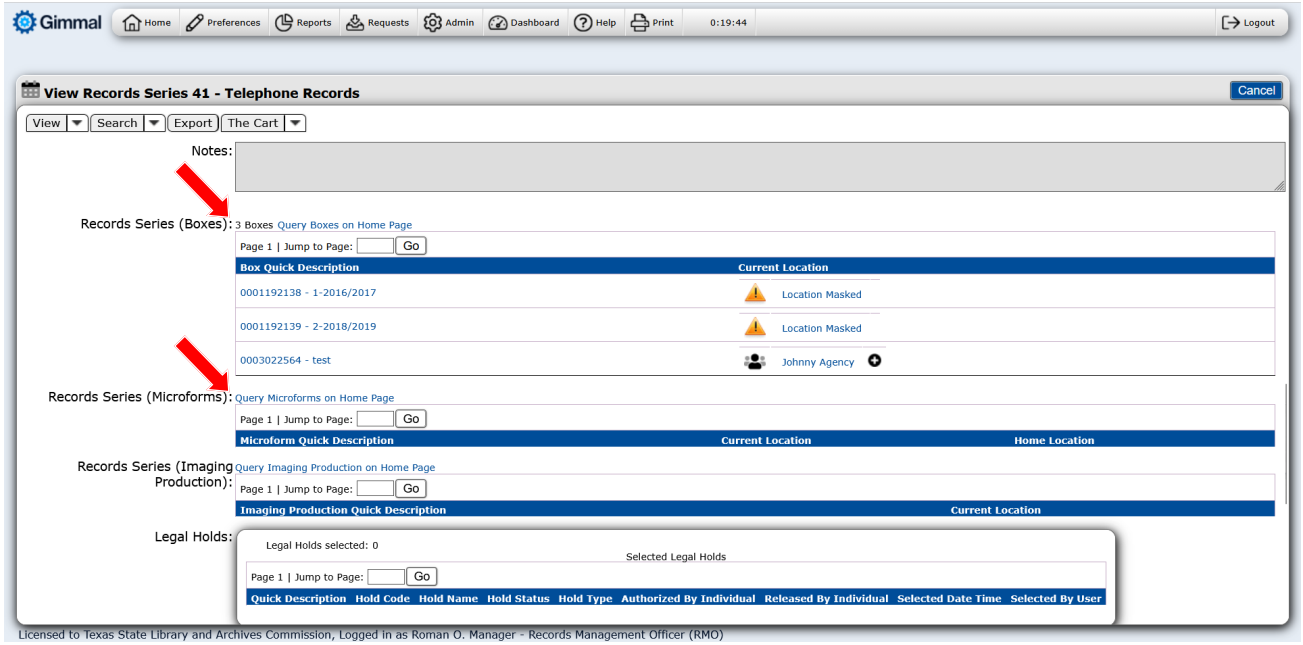
From the second column of the worksheet, type the first AIN with items assigned **(1)** in the **AIN** field, then click once **(2)** on the **Search** button.

Review the first AIN to determine for boxes/microforms



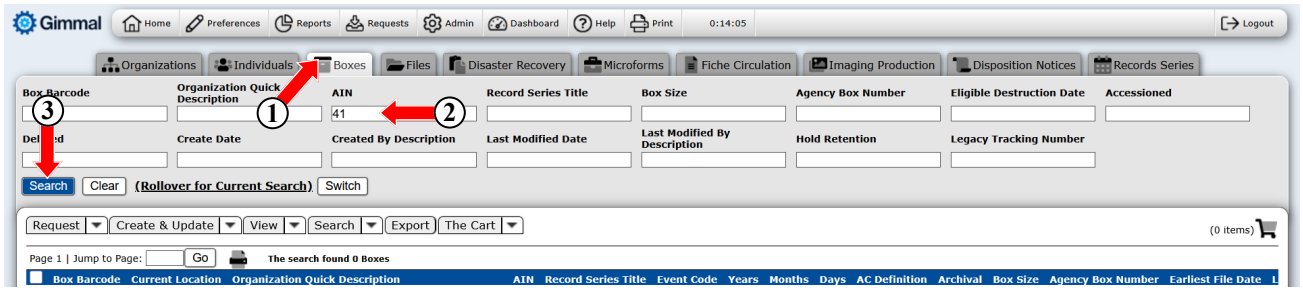
Click once on the hyperlink (Agency Name information) under the **Organization Quick Description** column to view information for the Record Series.

Look at the Boxes and Microforms sections



Review the **Records Series (Boxes)** and **Records Series (Microforms)** sections to see if items are assigned. Make a note of this on the Obsolete Series Report printout for this AIN. Repeat this process for each AIN that was found to have items assigned.

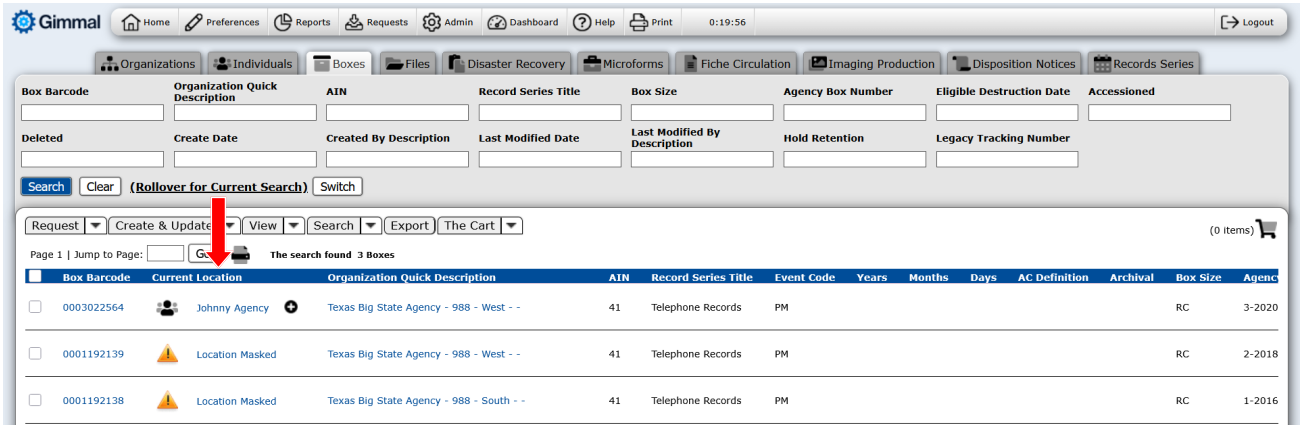
Find boxes/microforms assigned to the obsolete AIN



Determine which approved AIN is going to be assigned to the items assigned to each obsolete AIN. That can be noted on the obsolete Series report, as well. In the earlier illustration, AIN 41 had only boxes assigned to it. It was determined by the records management team that any items assigned to AIN 41 will be reassigned to AIN 54.

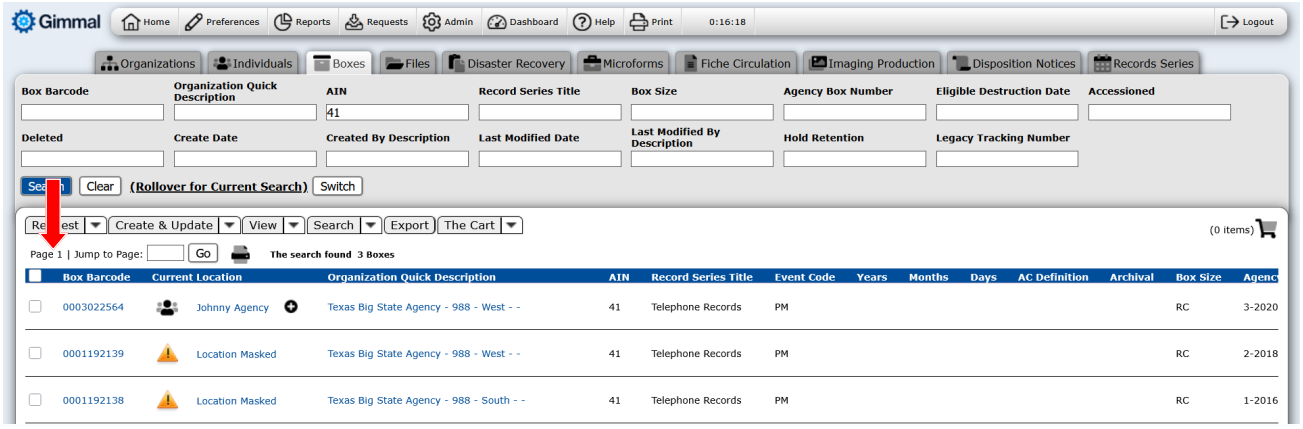
On the Boxes or Microforms tab **(1)**, enter the first AIN with items assigned **(2)** in the **AIN** field, then click once **(3)** on **Search**.

Update items assigned to obsolete AIN



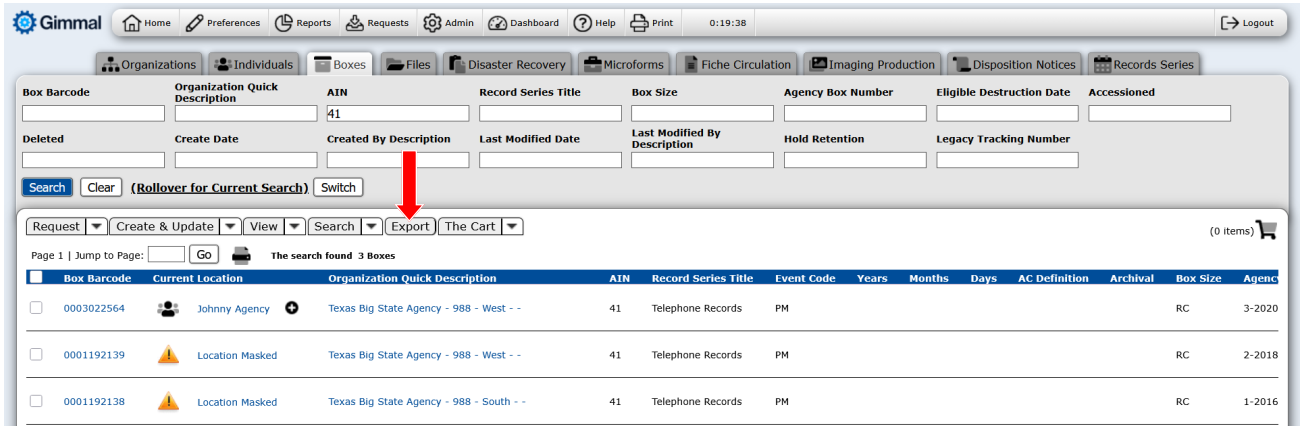
The items being updated are either at the agency or at the SRC. The **Current Location** column tells where the items are. The location of the items has no impact on the update process.

Review the Organization Quick Description column



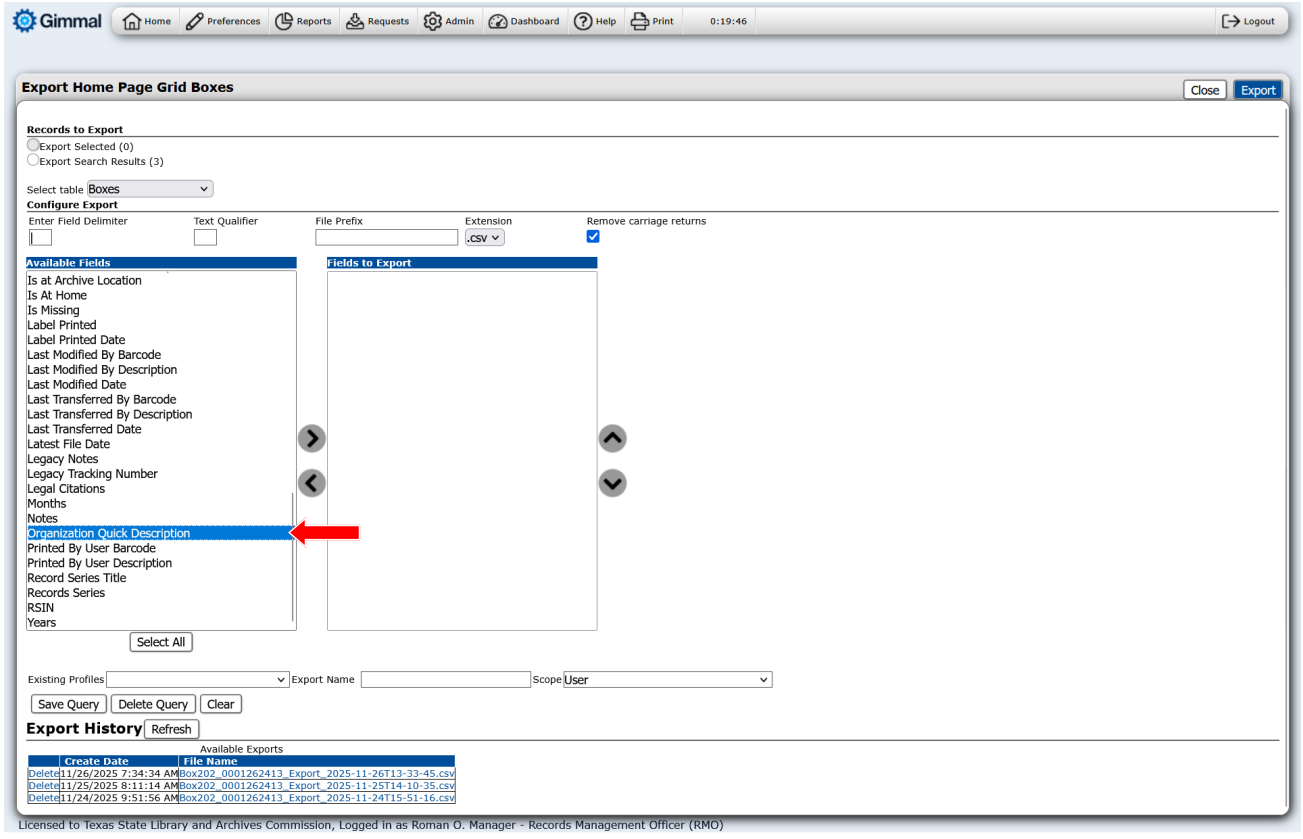
If items are assigned to more than one Organization, continue to the next page. If items are assigned to one Organization, go to Page 294. Make sure to check other pages if there is more than one page.

Export Organization information



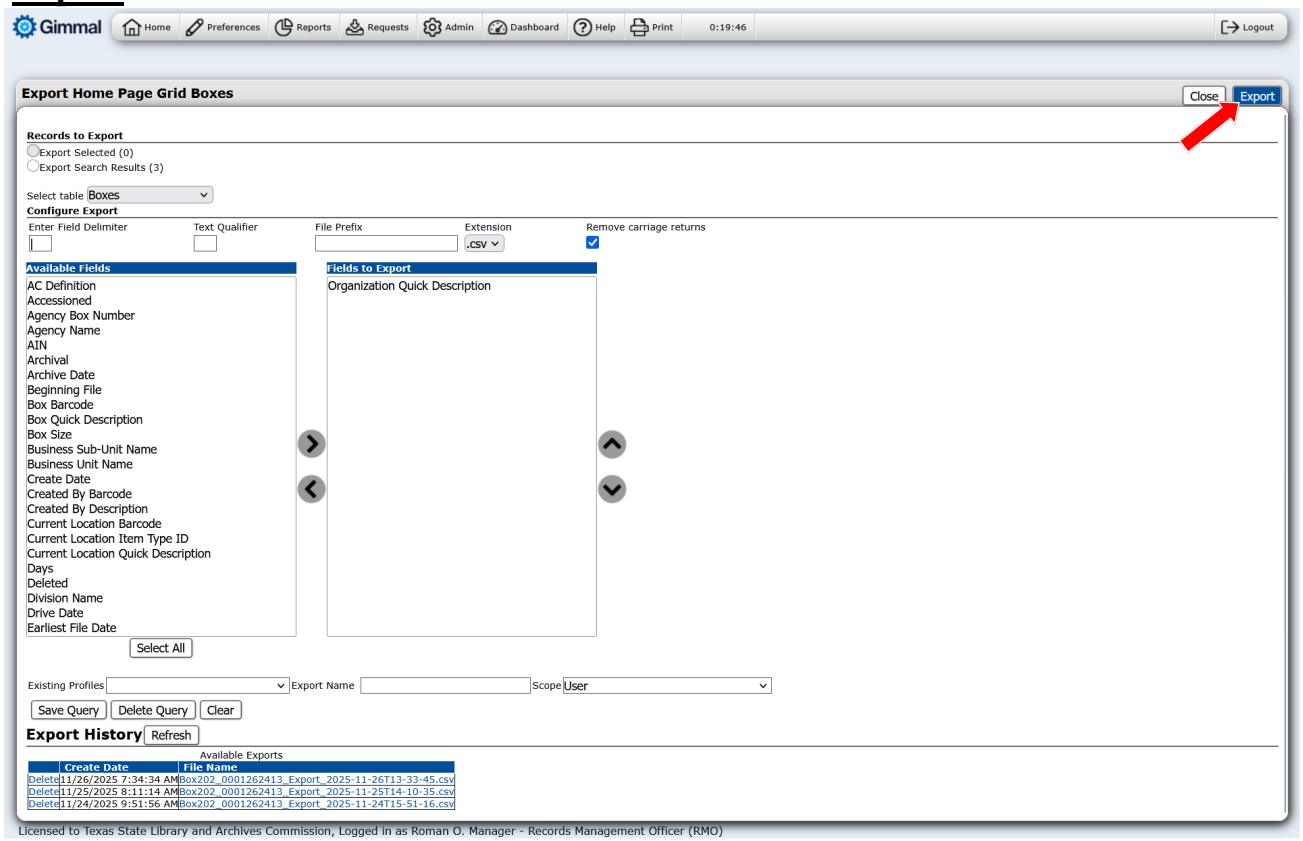
When items are assigned to multiple organizations, click once on the **Export** button.

Export Home Page Grid Boxes (or Microforms when working on the Microforms tab)



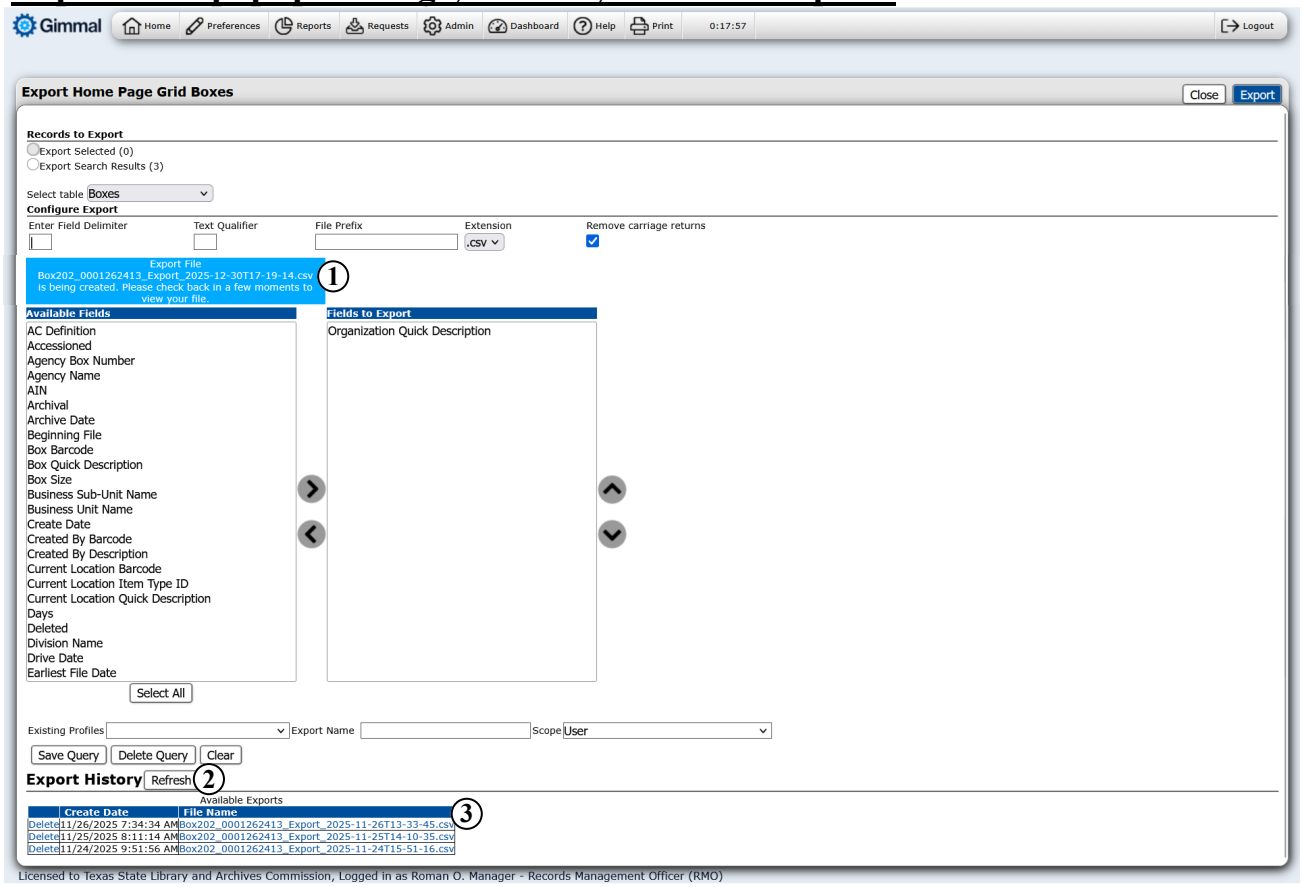
Scroll down the **Available Fields** column to find **Organization Quick Description**. Click twice on it to move it to the **Fields to Export** column. For more information about exporting, please see ***Supplemental Information: Export*** (Page 221).

Export



Click once on **Export**.

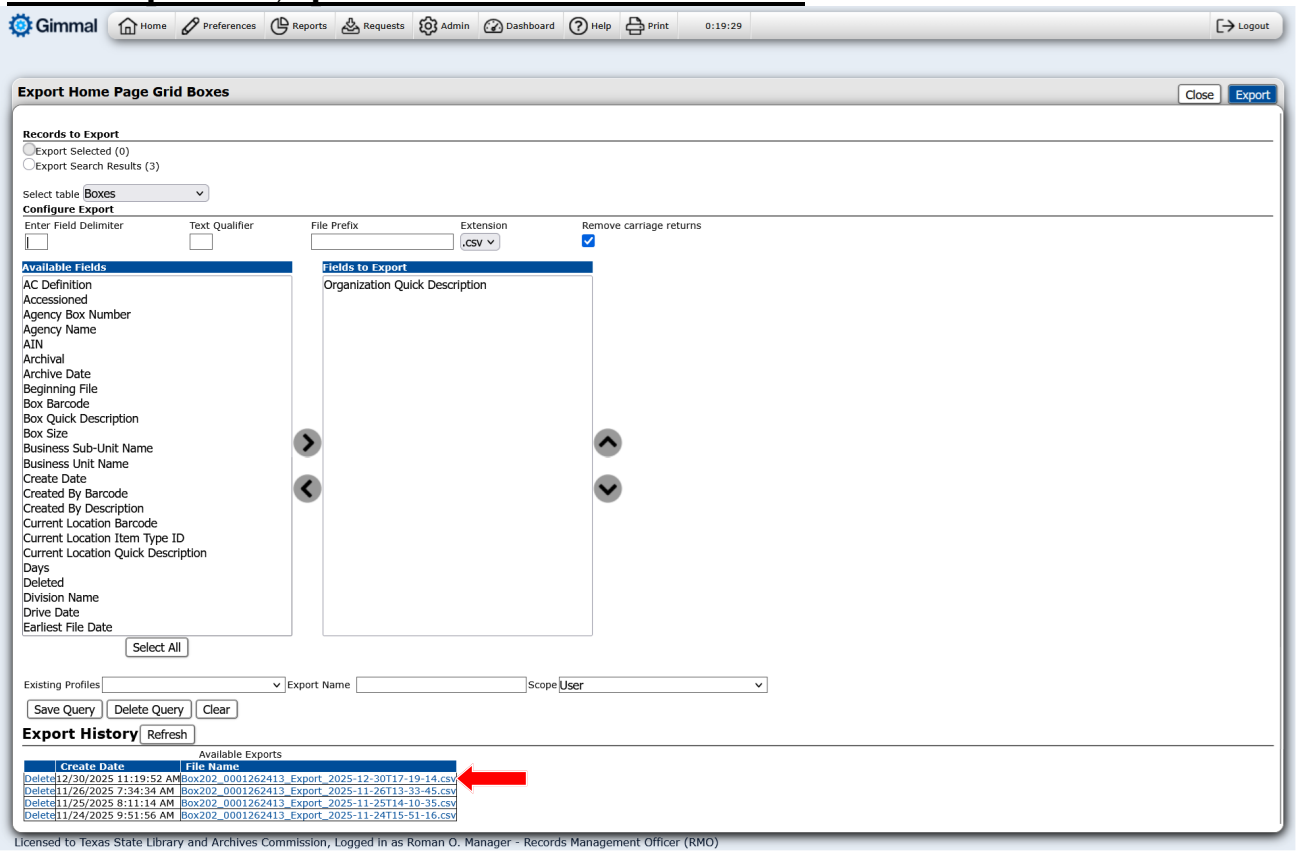
Export blue popup message, Refresh, Available Exports



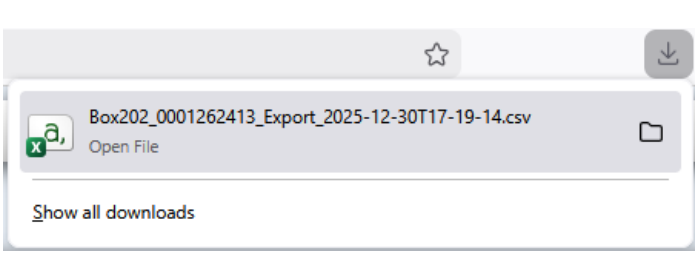
A blue information box **(1)** will show the export file name being generated. In this case, the file name is **Box202_0001262413_Export_2025-12-30T17-19-14.csv**

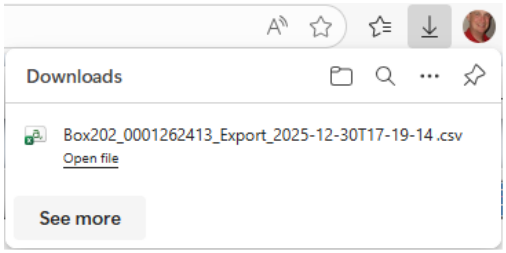
Click **(2)** the **Refresh** button until the file name appears in the **Available Exports** section **(3)**. Depending on the number of items and software traffic, it might take several minutes for the export to process. If there are other file names in this section, they are exports that were processed in the past. Click **Delete** in the left column to remove previous exports if they are not needed.

Select export file, open Excel worksheet document



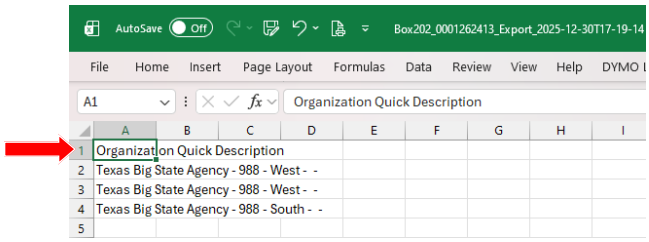
When the filename appears in **Available Exports**, click once on the file name.



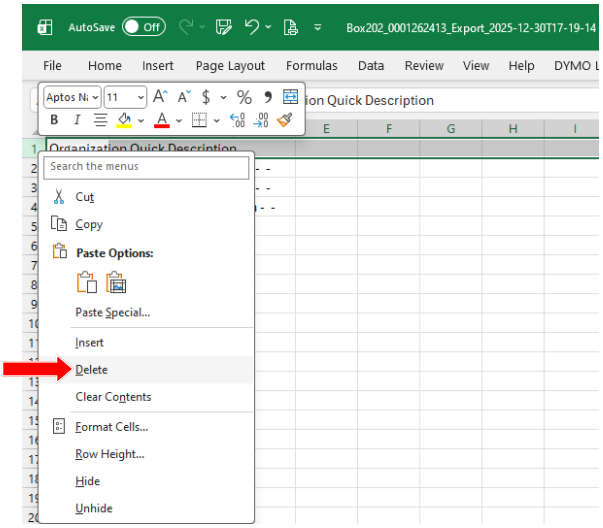


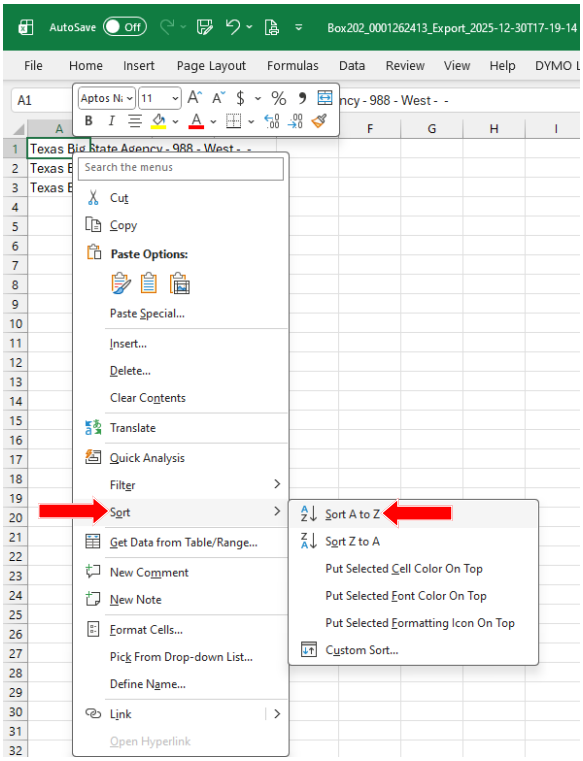
The web browser used will depend upon how the download file appears near the top of the screen. Firefox is shown above left and Microsoft Edge is shown above right. Click once on **Open File**.

Format the Excel worksheet



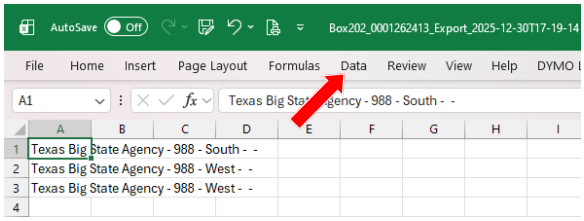
When the Excel file opens, delete the first line that has **Organization Quick Description**. Click once **(1)** into the first row heading column. That will select the first row. Right click the mouse **(2)**, click once on **Delete**.



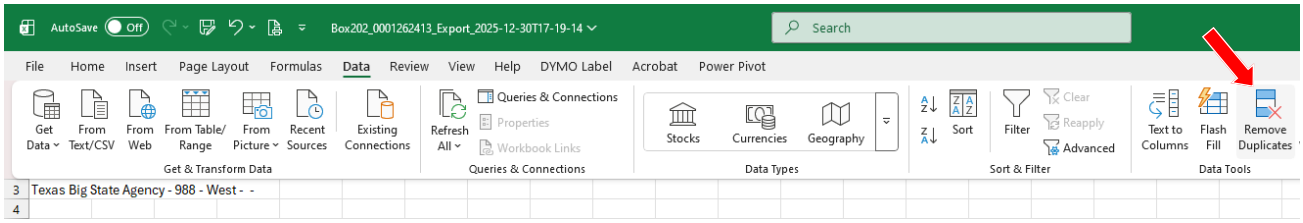


After the organization deader is deleted, click once into the first column of the first cell. Right click to show a menu. Hover the mouse over **Sort**. A menu shows to the right. Click once on **Sort A to Z** (or it might say **Sort Smallest to Largest** depending upon the version of Excel).

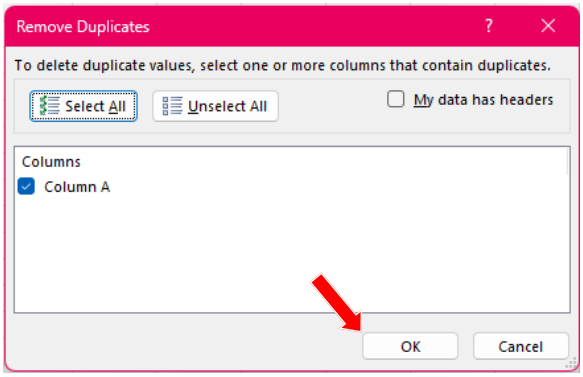
Format the data



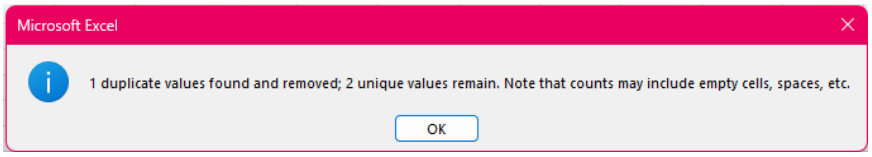
Remove duplicates so there is a list of individual organizations assigned to the boxes that need to be updated. To do this, click once on **Data** at the top of the screen.



In the **Data Tools** section, click once on **Remove Duplicates**.

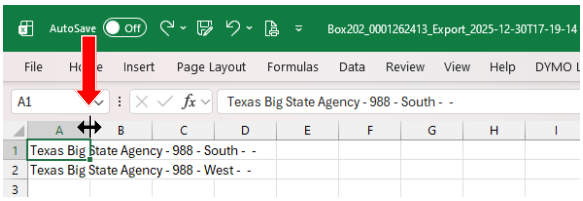


In the **Remove Duplicates** popup, **Column A** is selected, **My data has headers** is not selected. Click once on **OK.**



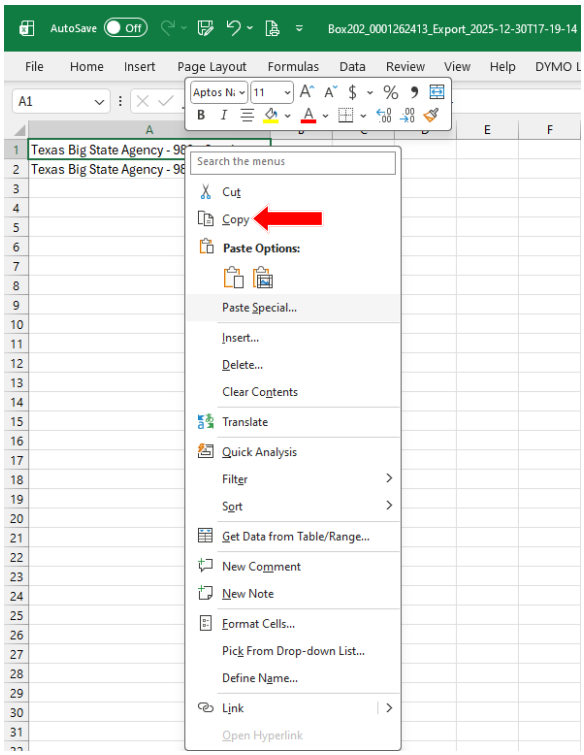
A popup will confirm how many duplicates were removed and how many unique values remain. Click once on **OK**.

Expand Column A to the length of the longest data line

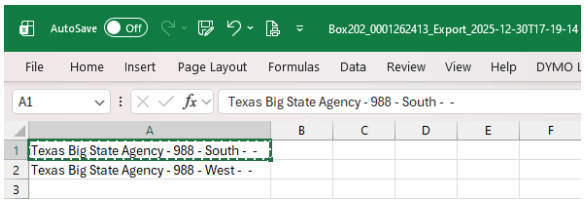


To expand the first column to the end of the longest data line, hover the mouse on the vertical line between the A and B column headers. A symbol will show with an arrow pointing left and right. Double click on the line between columns A and B. Column A will expand to the right.

Copy the first Organization's data cell

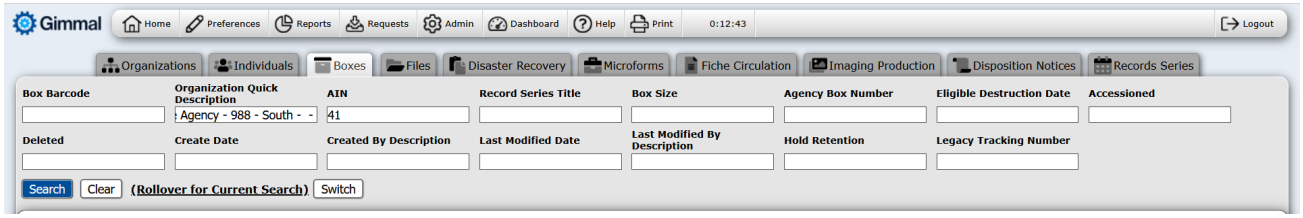


Right click once on the first data cell, click once on **Copy**.



When the field is copied, a dashed box appears around it. Return to Gimmal.

Paste copied information into Gimmal, Search



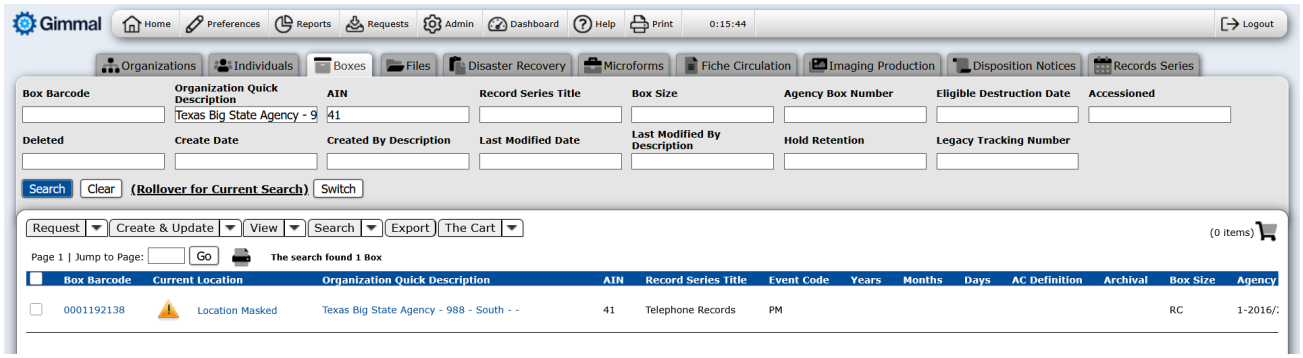
Paste the copied information into the **Organization Quick Description** field **(1)**. Type the obsolete Agency Item Number in the **AIN** field **(2)**. Click once **(3)** on **Search**.

BOXYBIT *In the Organization Quick Description field, if there are pairs of hyphens with no data between them, make sure there are two spaces between the hyphens.*

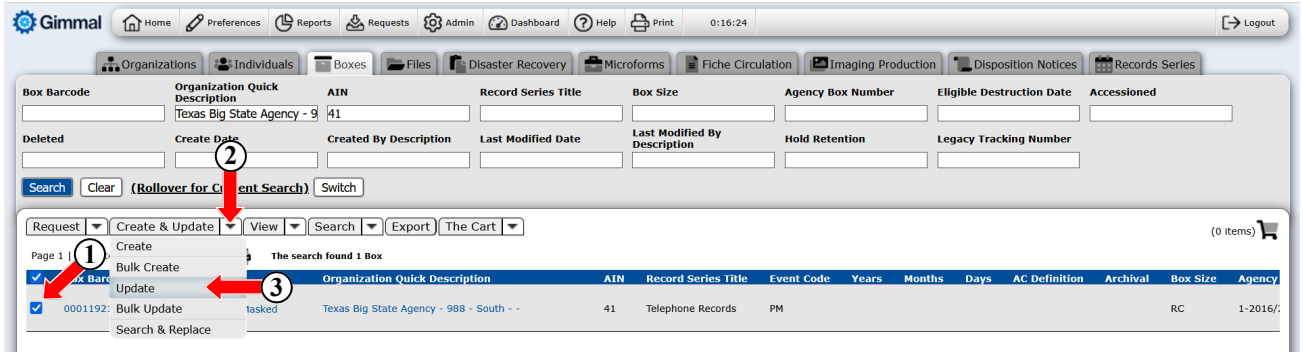
Update one item or several items?

If one item needs to be updated, continue below. If several items need to be bulk updated, turn to Page 297 and see **Bulk Update multiple items assigned to one Organization**.

Update one item assigned to one Organization

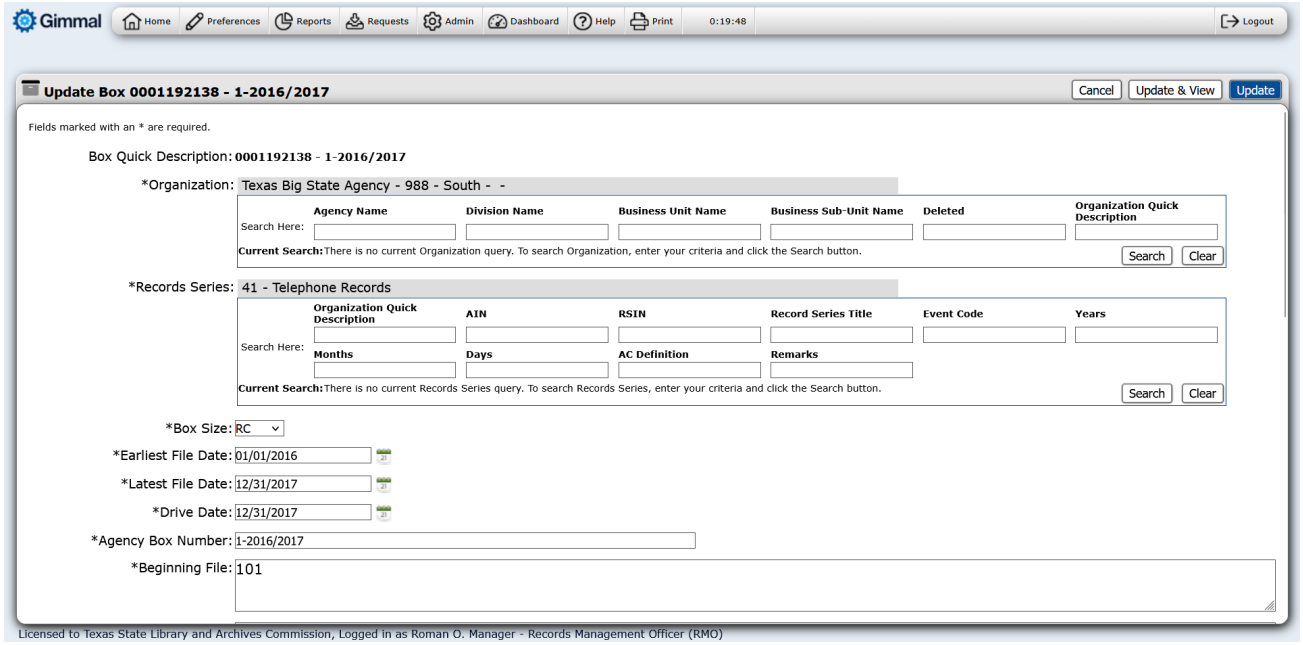


The search found one item.



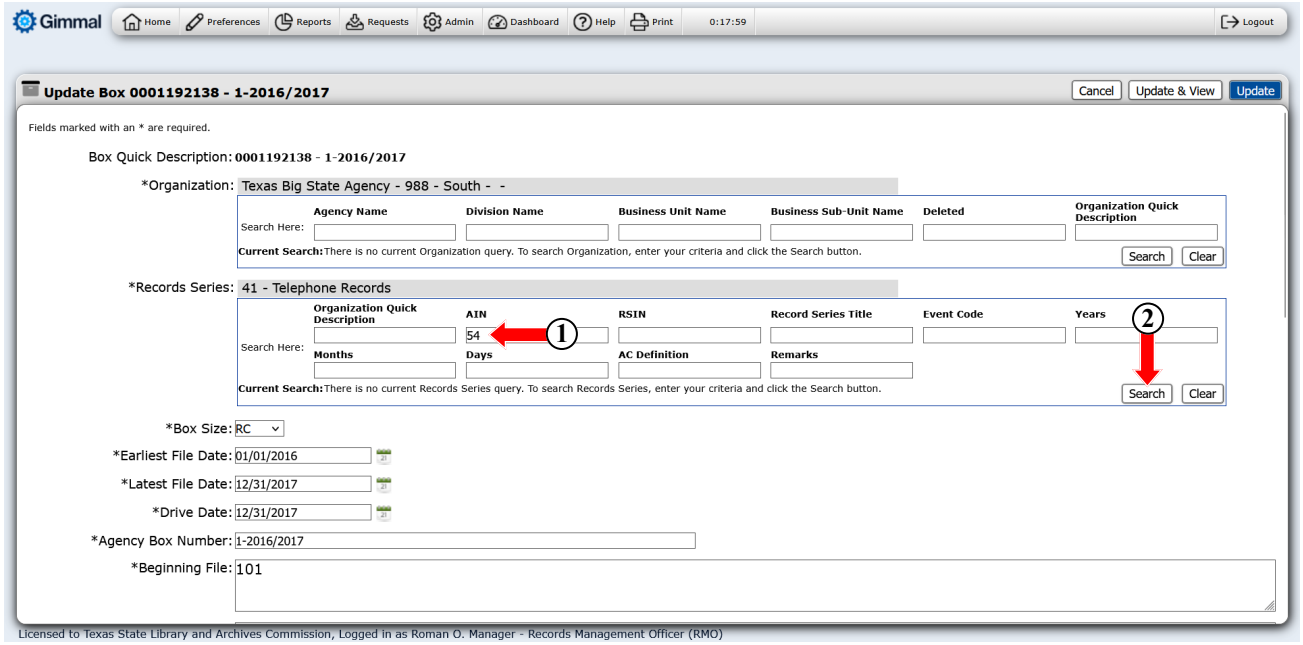
Select the item **(1)**, click once **(2)** on **Create & Update**, and click once **(3)** on **Update**.

The Update screen

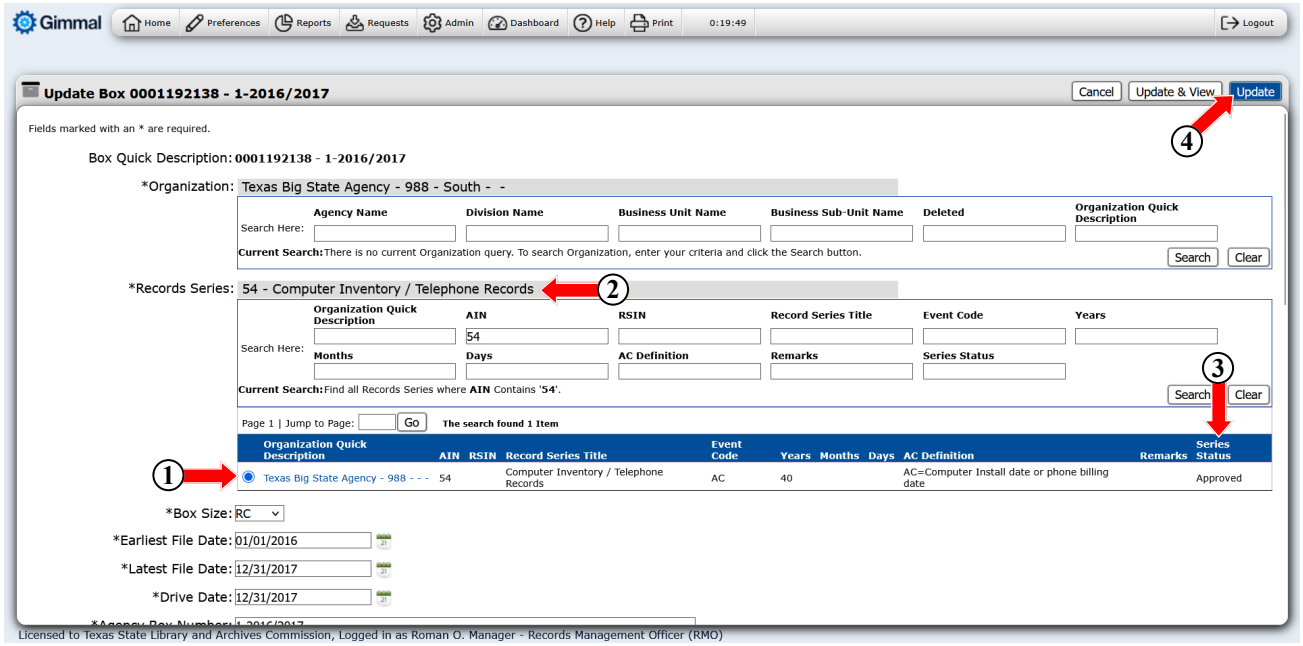


The primary data field to update is **Records Series**. Update other fields as needed.

Search and find the approved Records Series

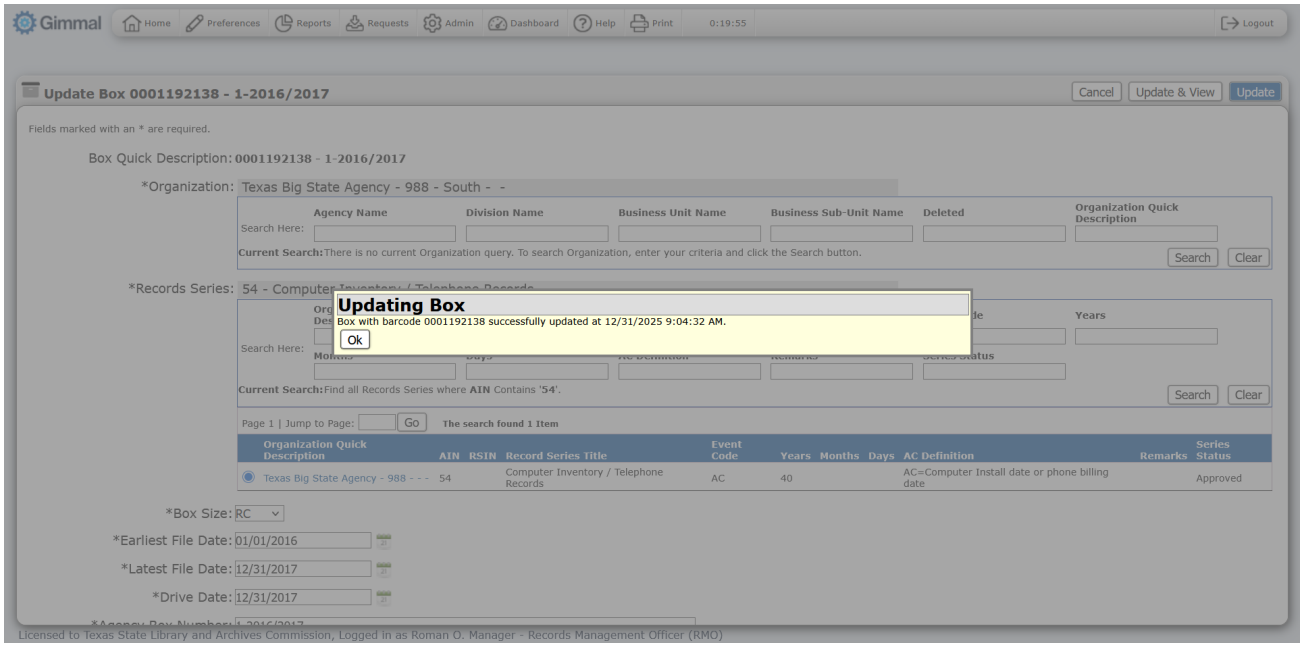


In the **AIN** field **(1)**, type the Agency Item Number for the approved Records Series to replace the obsolete Records Series. Click once **(2)** on **Search**.

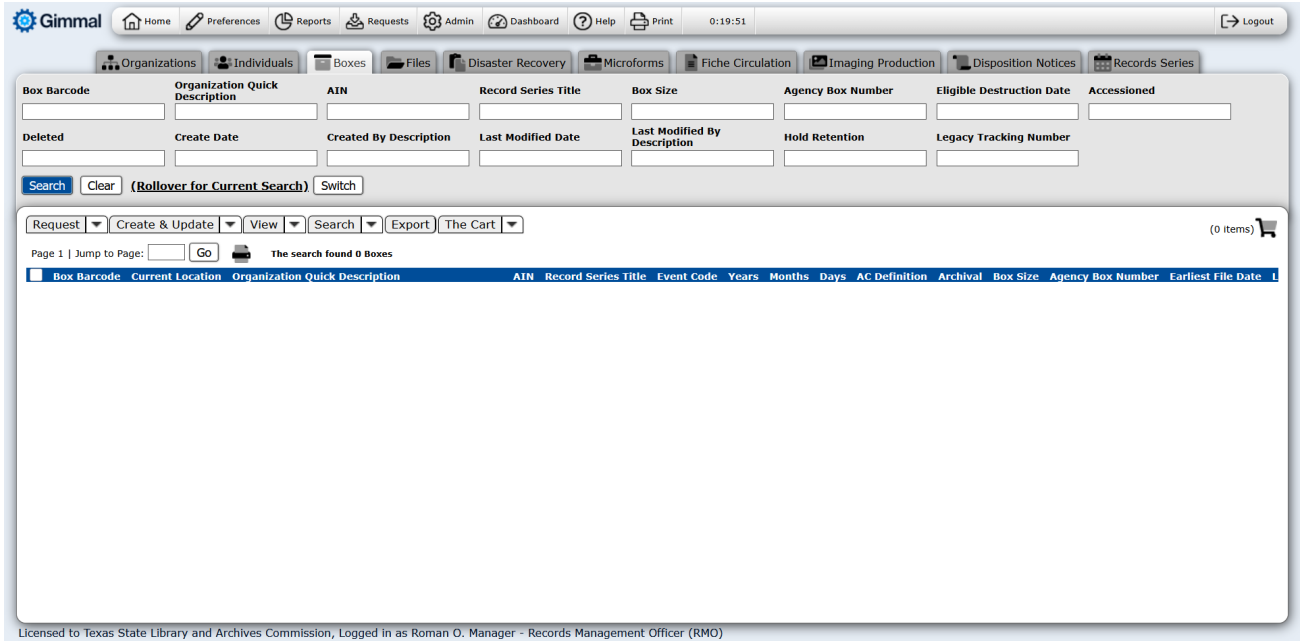


If one Record Series is found, it will automatically select **(1)** and populate the **Records Series** field **(2)**. Since the search could find the AIN in any form (54 could be found for 54, 154, 1542, 254, etc.), the Records Series might need to be selected for it to populate in the Records Series field. The **Series Status** field **(3)** shows this is an **Approved** Records Series. When the Records Series field is complete, click once **(4)** on **Update** at the top right.

Update is complete

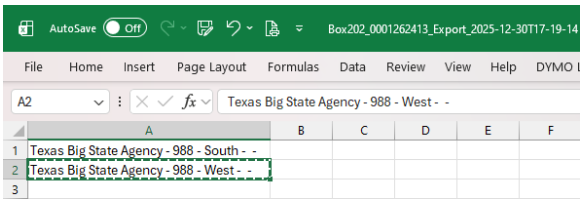


The popup confirms the update is complete. Click once on **Ok**.

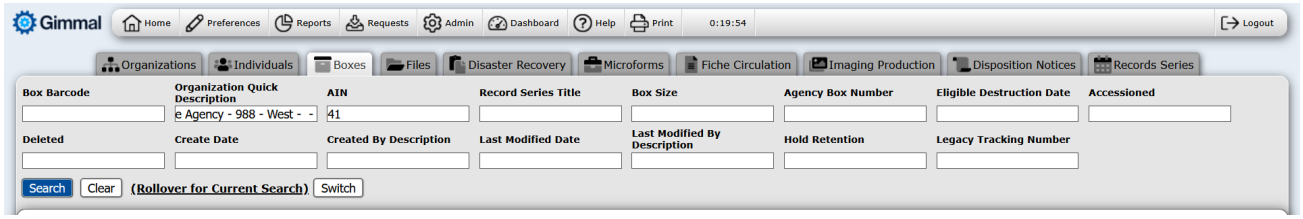


After clicking Ok, the screen returns to the home page. The box is no longer seen because the previous search was for items for a specific organization assigned to an obsolete Records Series. Since the Records Series was updated to an approved Records Series, no items are found.
Return to the Organizations worksheet (Page 293) and do the search for the next Organization and the obsolete AIN. That process continues on the next page. If there is no other Organizations, this process is complete.

Search for the next Organization



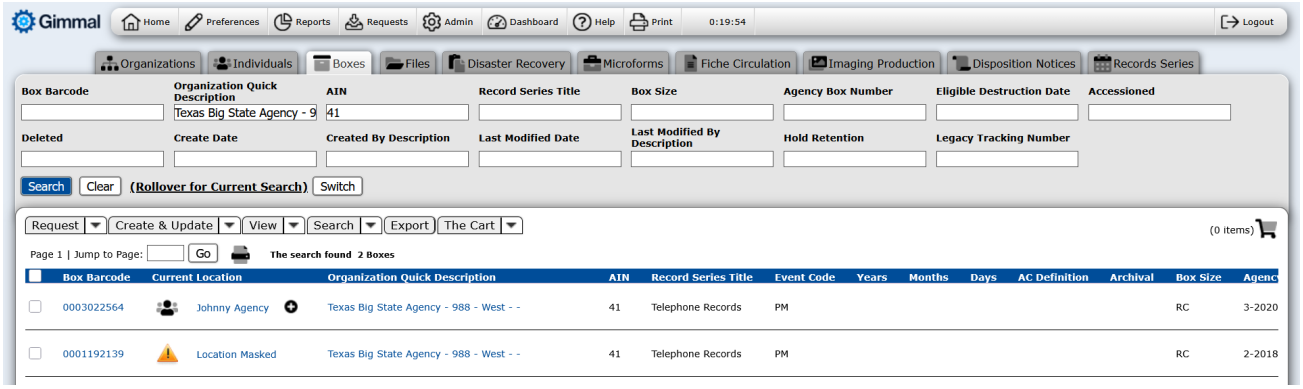
Select and copy the next Organization on the worksheet. Return to Gimmal.



Paste the copied information into the **Organization Quick Description** field **(1)**. Type the obsolete Agency Item Number in the **AIN** field **(2)**. Click once **(3)** on **Search**.

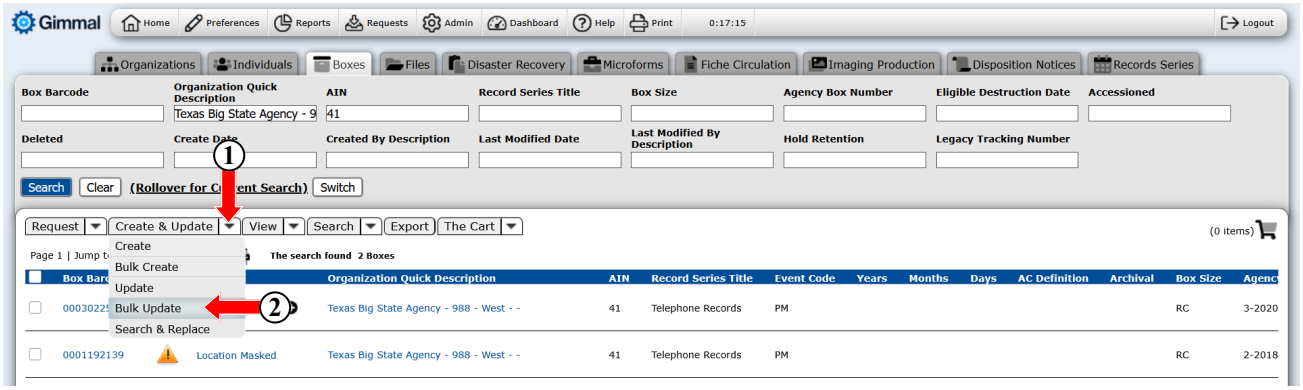
BOXYBIT *In the Organization Quick Description field, if there are pairs of hyphens with no data between them, make sure there are two spaces between the hyphens.*

Bulk Update multiple items assigned to one Organization



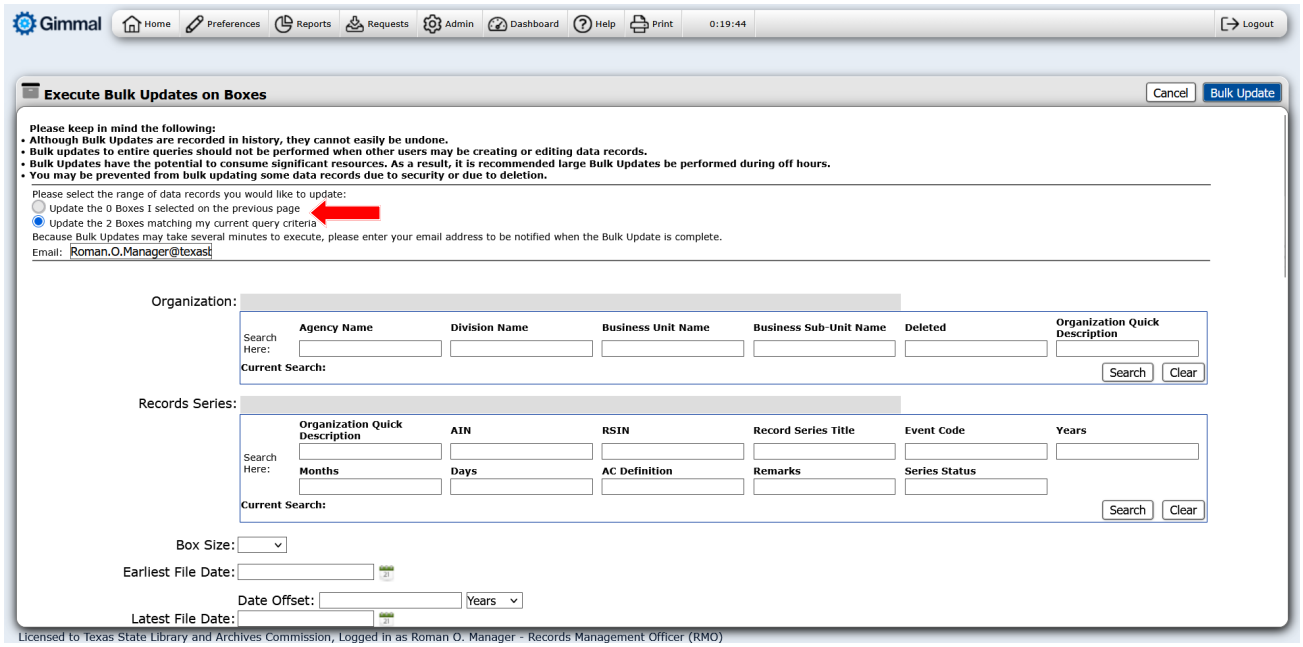
The search found more than one item. Make note of the Division (if there is one), Business Unit, Business Sub Unit. Organization Quick Description is formatted like this:

Agency Name - Agency Code - Division - Business Unit - Business Sub Unit

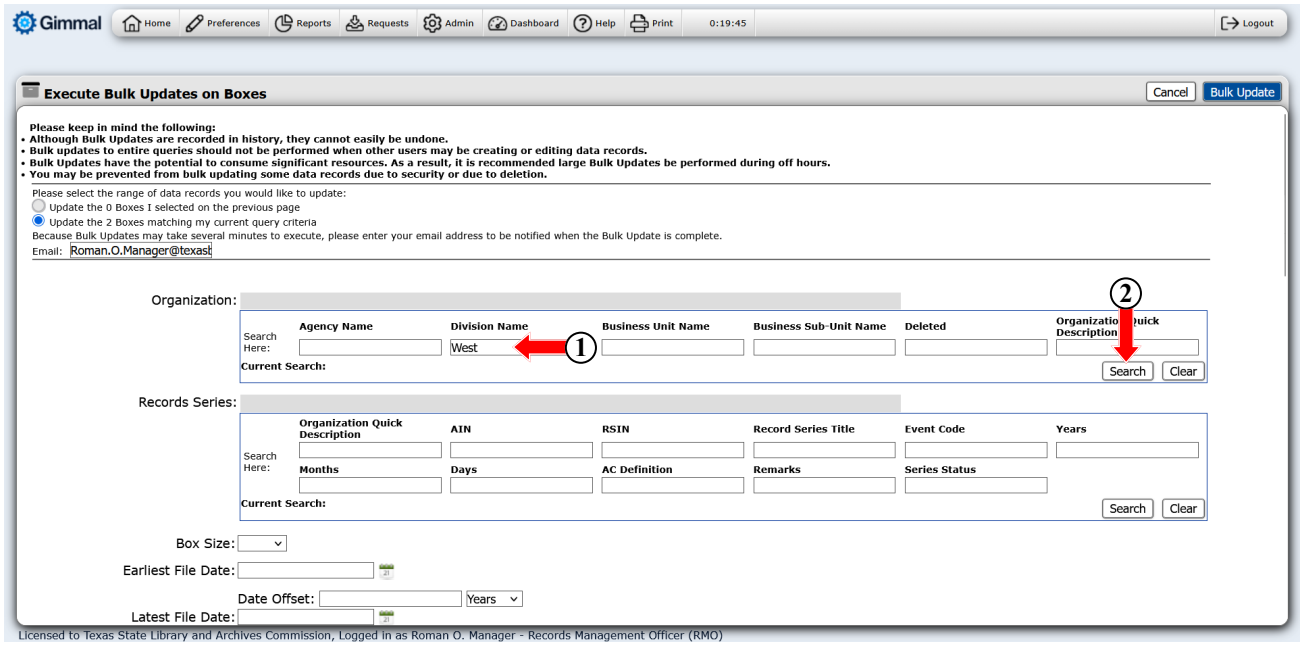


Do not select any items. If any items are on additional pages, they will be updated in this process, too, so there is no need to get the items on one page. Click once **(1)** on **Create & Update**, and click once **(2)** on **Bulk Update**.

Execute Bulk Updates on Boxes (or Microforms) screen

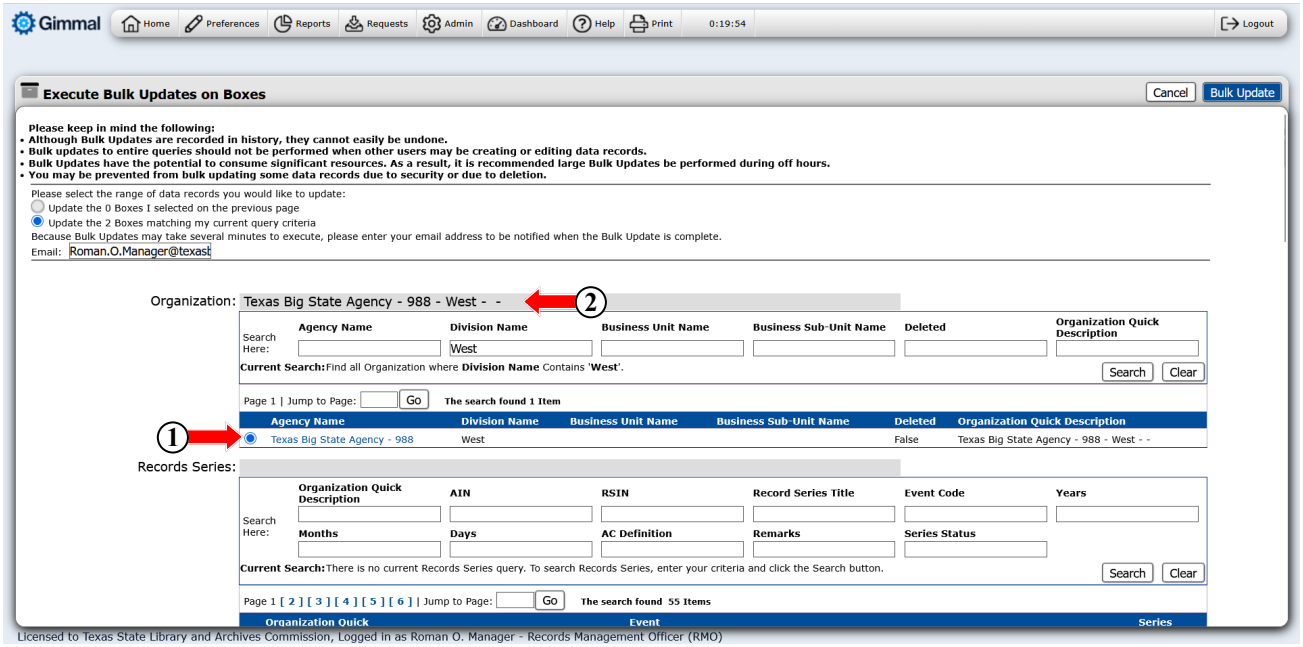


The section near the top of the screen has two radio buttons. The first one would be selected if any items on the previous screen were selected. The second radio button is selected when the bulk update is going to update all of the items found.



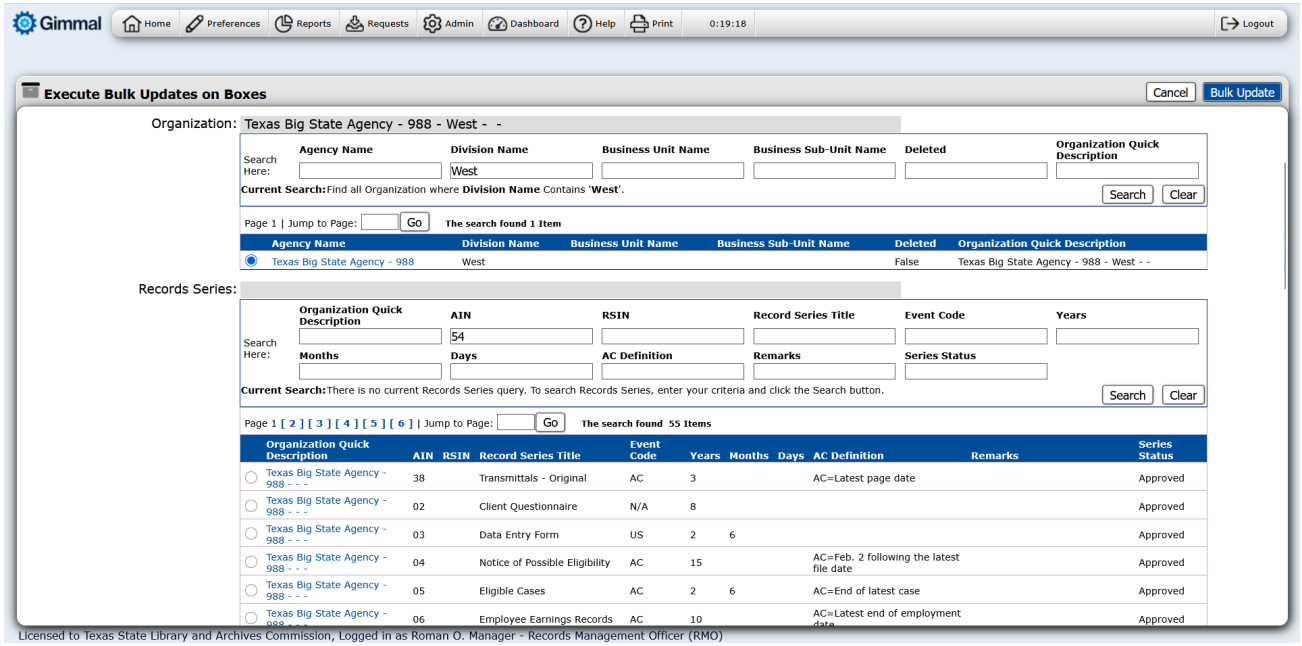
Type the Division in the **Division Name** field **(1)**. If there is no division, type **ISNULL** in the Division Name field. Click once **(2)** on **Search.**

Search/Select Organization



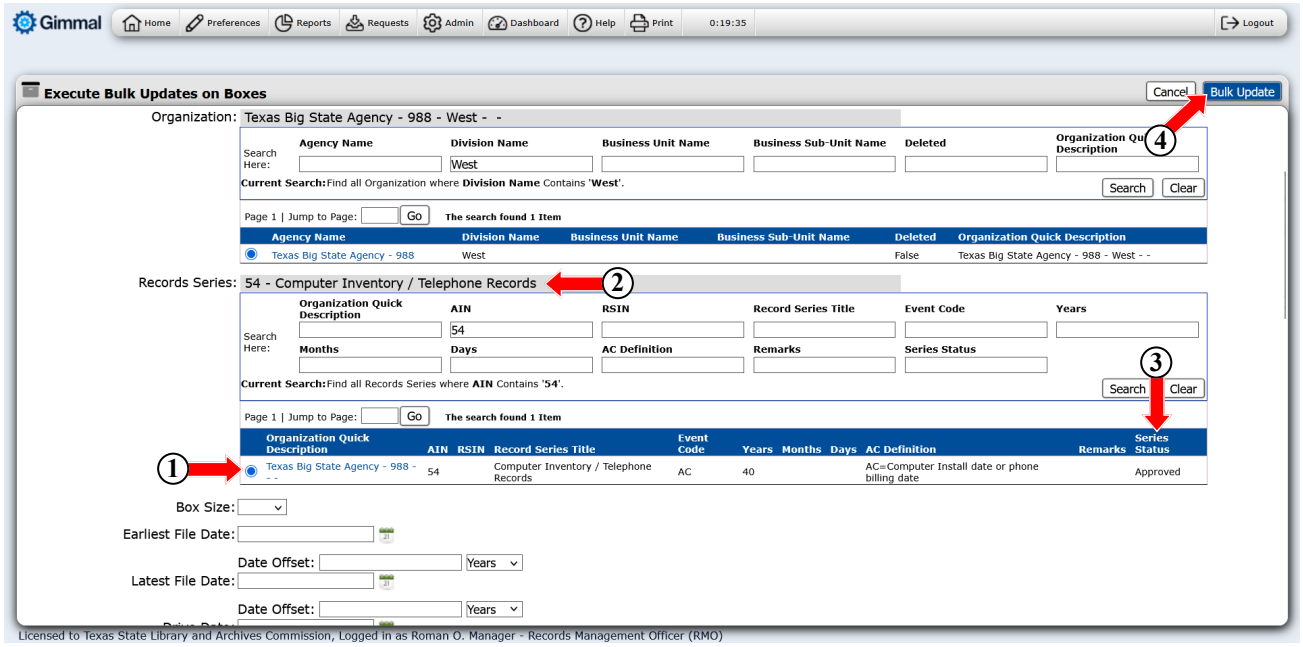
If one Organization is found **(1)**, Gimmal automatically selects it and populates the Organization field **(2)**. If more than one Organization is found, the correct one will need to be selected. Make sure to select the same Organization that was copied from the worksheet.

Search the approved Records Series



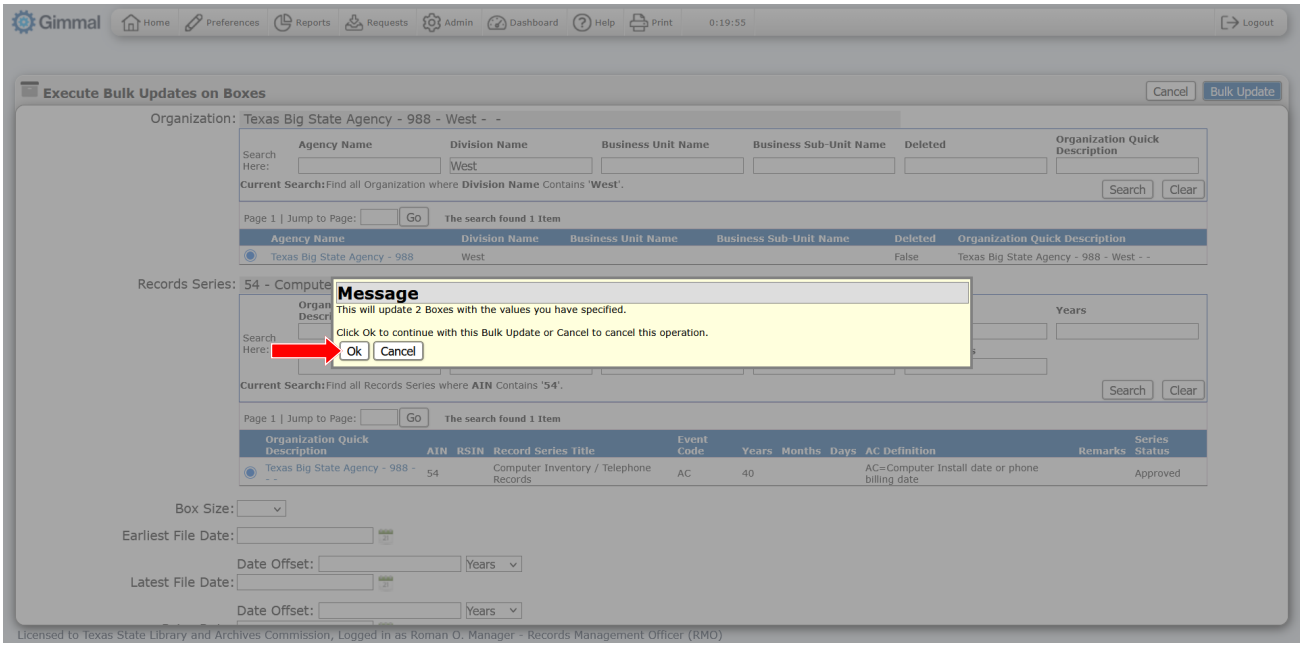
In the **AIN** field **(1)**, type the Agency Item Number for the approved Records Series to replace the obsolete Records Series. Click once **(2)** on **Search**.

Select the approved Records Series



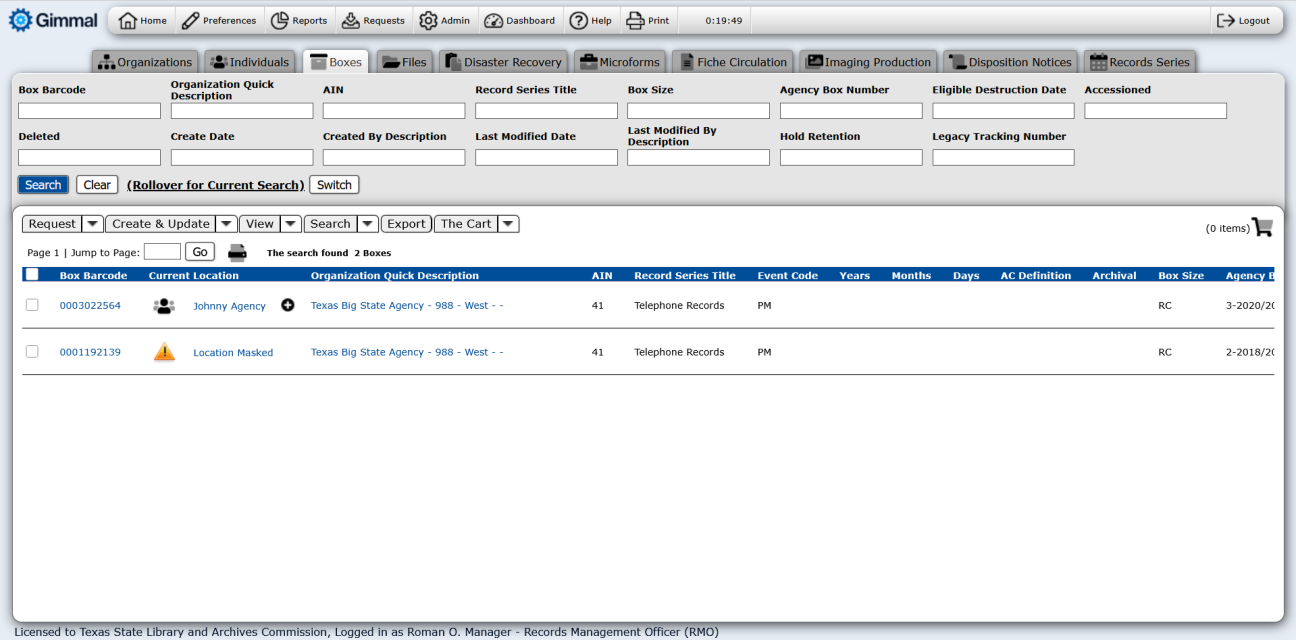
If one Record Series is found, it will automatically select **(1)** and populate the **Records Series** field **(2)**. Since the search could find the AIN in any form (54 could be found for 54, 154, 1542, 254, etc.), the Records Series might need to be selected for it to populate in the Records Series field. The **Series Status** field **(3)** shows this is an **Approved** Records Series. When the Records Series field is complete, click once **(4)** on **Update** at the top right.

Update popup message



Click once on **Ok** to process the bulk update. Click **Cancel** to stop the bulk update.

Return to home page



Gimmal returns to the home page. It looks like the items did not process, but the system is processing the bulk update. An email will be received when the process is complete. At that time, refresh the page and the boxes will be gone because it is looking for items assigned to the specific organization assigned to the obsolete Agency Item Number.

Continue the process if there are other Organizations for this obsolete Records Series then move on to the next Obsolete Records Series with items assigned to it until all items assigned to all obsolete Records Series are assigned to approved Records Series.

NOTES

Request Destruction for Items in Gimmal

The destruction process for items in Gimmal has up to four parts:

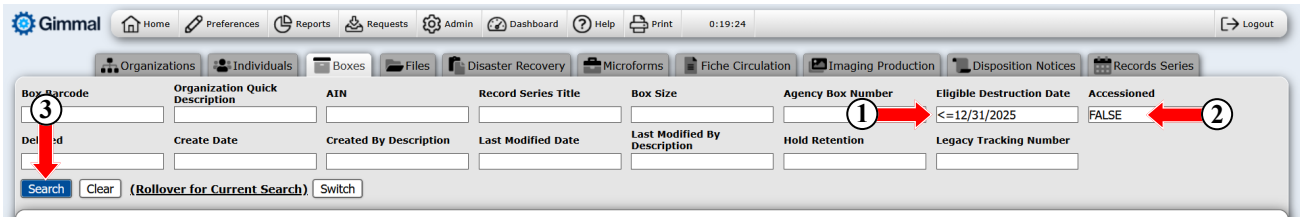
I. Review, delete, place holds, collect data for boxes and/or microforms in Gimmal (begins below)
II. Submit the email destruction request email (begins on Page 319)
III. View disposition information in Gimmal (Page 320)
IV. Optional: Submit the email destruction request email with Itemized Worksheet for destruction (begins on Page 321)

I. REVIEW, DELETE, PLACE HOLDS, COLLECT DATA FOR BOXES AND/OR MICROFORMS IN GIMMAL

Review for unaccessioned items (not eligible for destruction).

Unaccessioned items are those items on the Boxes and Microforms tabs that were created by a Gimmal client at the agency, but those items were never sent to the State Records Center (SRC). This is done as a type of housekeeping step to either place these items on hold or get them removed from Gimmal.

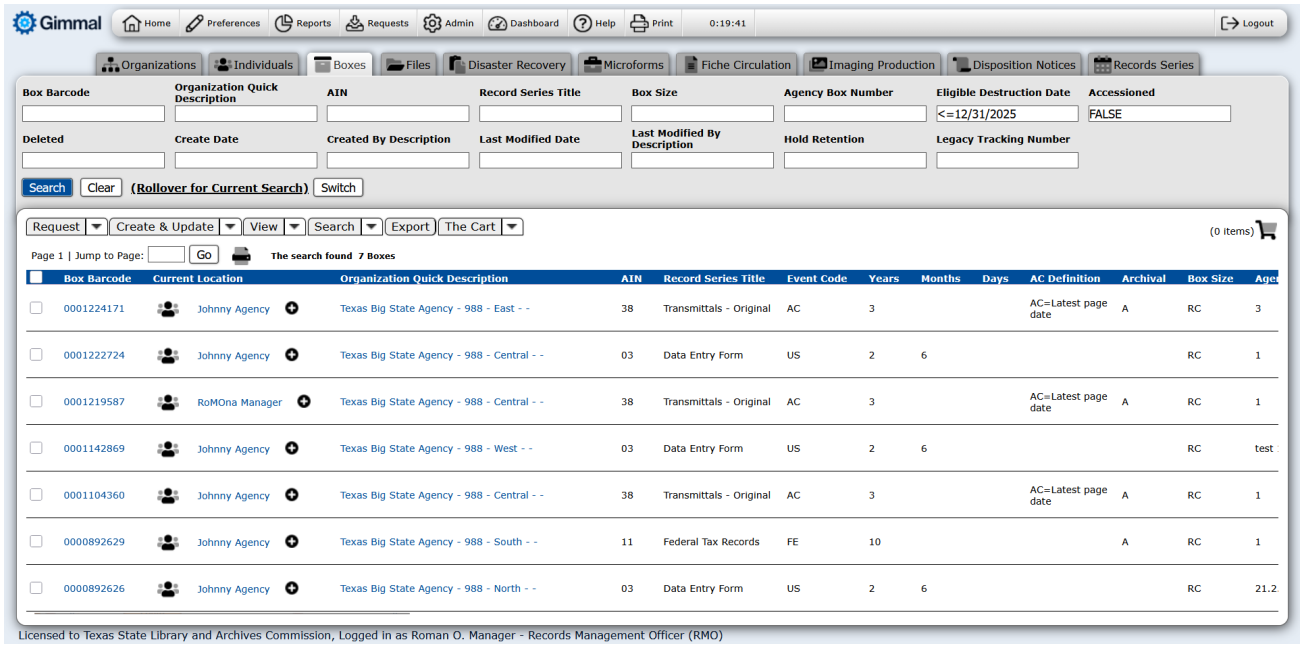
Search for unaccessioned items



Go to the Boxes tab (or Microforms tab) and search for unaccessioned items. In the **Eligible Destruction Date** field **(1)** enter the less than symbol < and the equal symbol = followed by the Target Date (latest Eligible Destruction Date that will be use for this entire destruction process) with no spaces, then in the **Accessioned** field **(2)** enter **False**, then click once **(3)** on **Search**.

Target Date Example: Use <=12/31/2025 to search for all unaccessioned items on this tab eligible for destruction until December 31, 2025.

Search results: Unaccessioned items



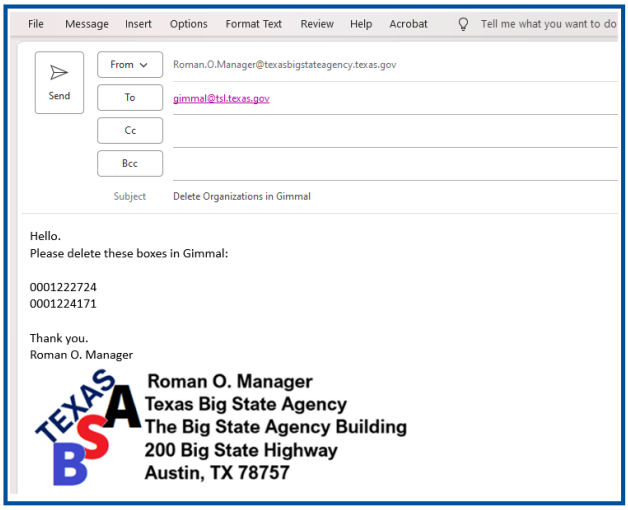
If unaccessioned items are found, go on to the next step.
If no unaccessioned items are found for the boxes and microforms tabs, go to **Review for Accessioned Items** on Page 305.

Unaccessioned items: Keep or delete

At this point, a determination needs to be made for the item(s) found: Keep or delete.

To keep: Nothing needs to be done.

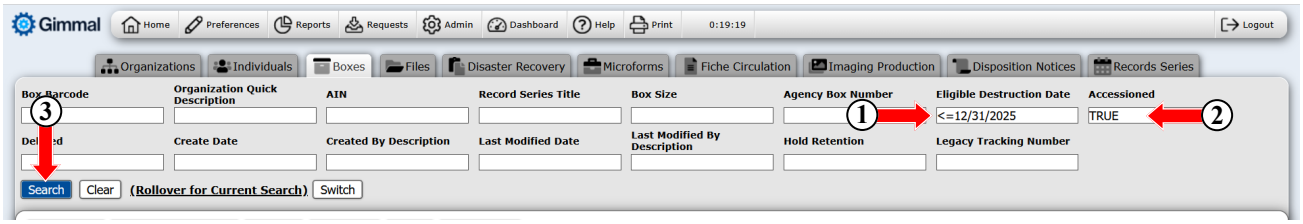
To delete: If it is determined that any unaccessioned items need to be deleted from Gimmal, please send an email to: **gimmal@tsl.texas.gov** and provide the barcode numbers (not a screenshot) for the items to be deleted and tell which tab (boxes or microforms) the items appear. When the email reply from the Gimmal administrator is received that confirms the items have been deleted, continue with the process. Here is an example of the email to request items to be deleted:



Review for Accessioned Items (eligible for destruction) and Create Worksheet

Accessioned items are those at the SRC or delivered from the SRC to an agency employee. Determine the latest Eligible Destruction Date (known in this process as Target Date) for the destruction request, this information is used throughout this process. Accessioned items up to this date will be available for the destruction report.

Search for accessioned items

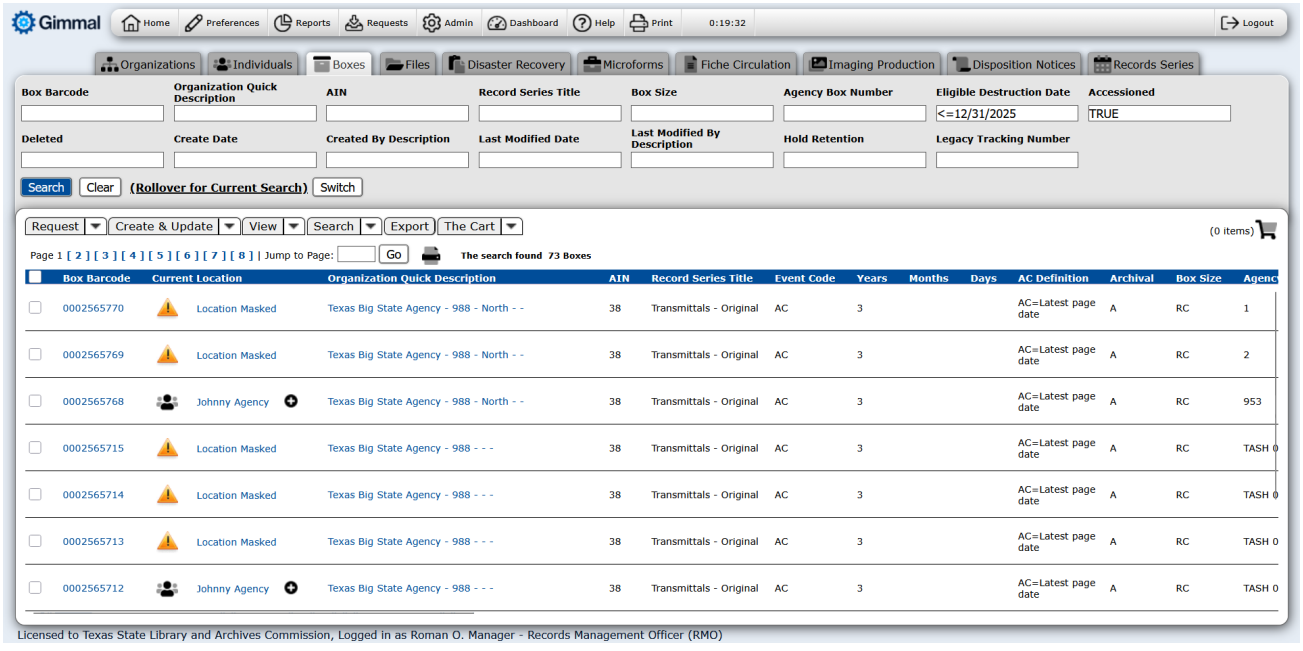


To review accessioned items eligible for destruction, go to the Boxes tab or the Microforms tab. In the **Quick Search** field (at the top of the screen), enter in the **Eligible Destruction Date** field **(1)** the less than symbol < and the equal symbol = followed by the Target Date (latest Eligible Destruction Date) with no spaces, then type **True** in the **Accessioned** field **(2)**, and click once **(3)** on **Search**.

A search for accessioned items excludes unaccessioned items. It may be determined by the RMO or RML that not all of these accessioned items will be selected for destruction and/or placed on hold. The Target Date should be the same Target Date used in the earlier instruction steps when reviewing unaccessioned items.

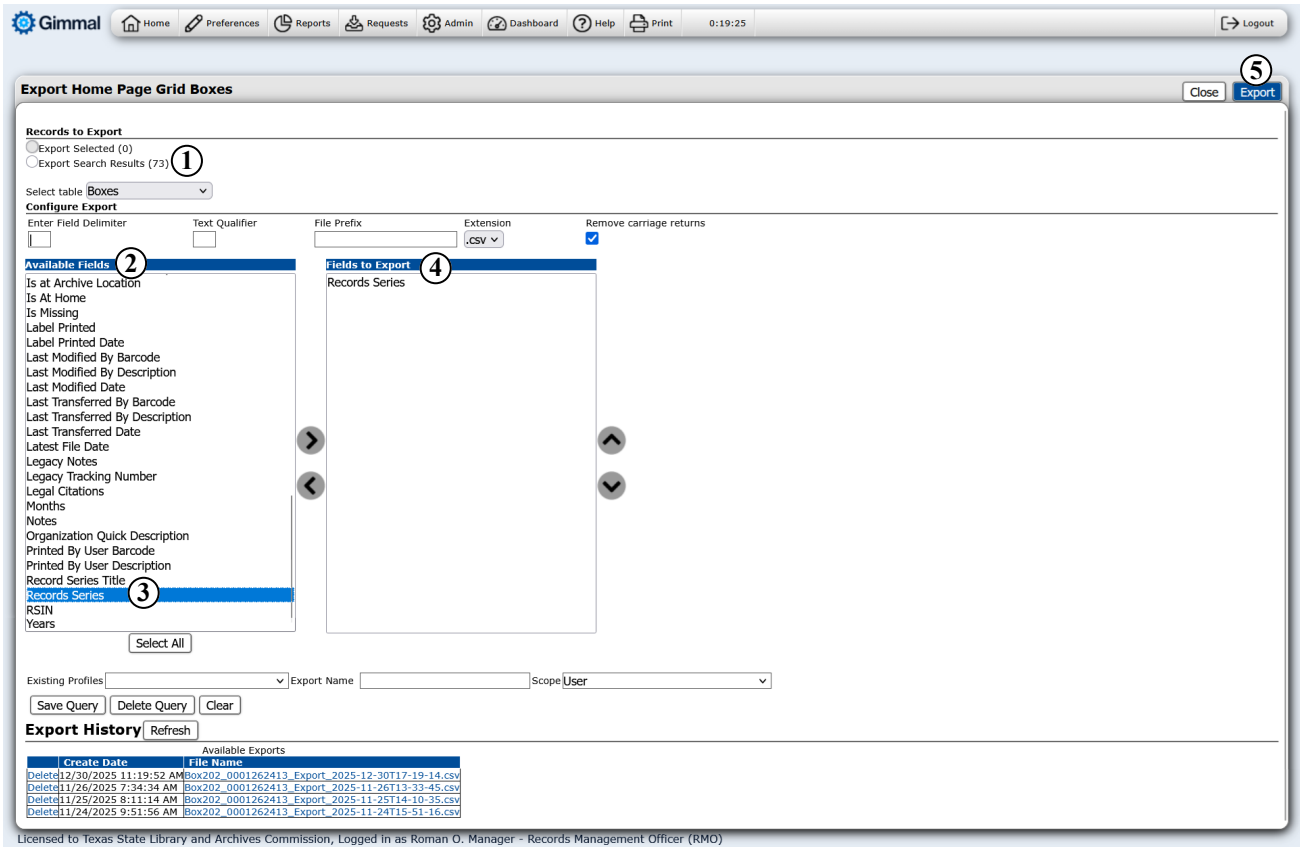
Target Date Example: Use <=12/31/2025 to search for all accessioned items on this tab eligible for destruction until December 31, 2025.

Export for accessioned items



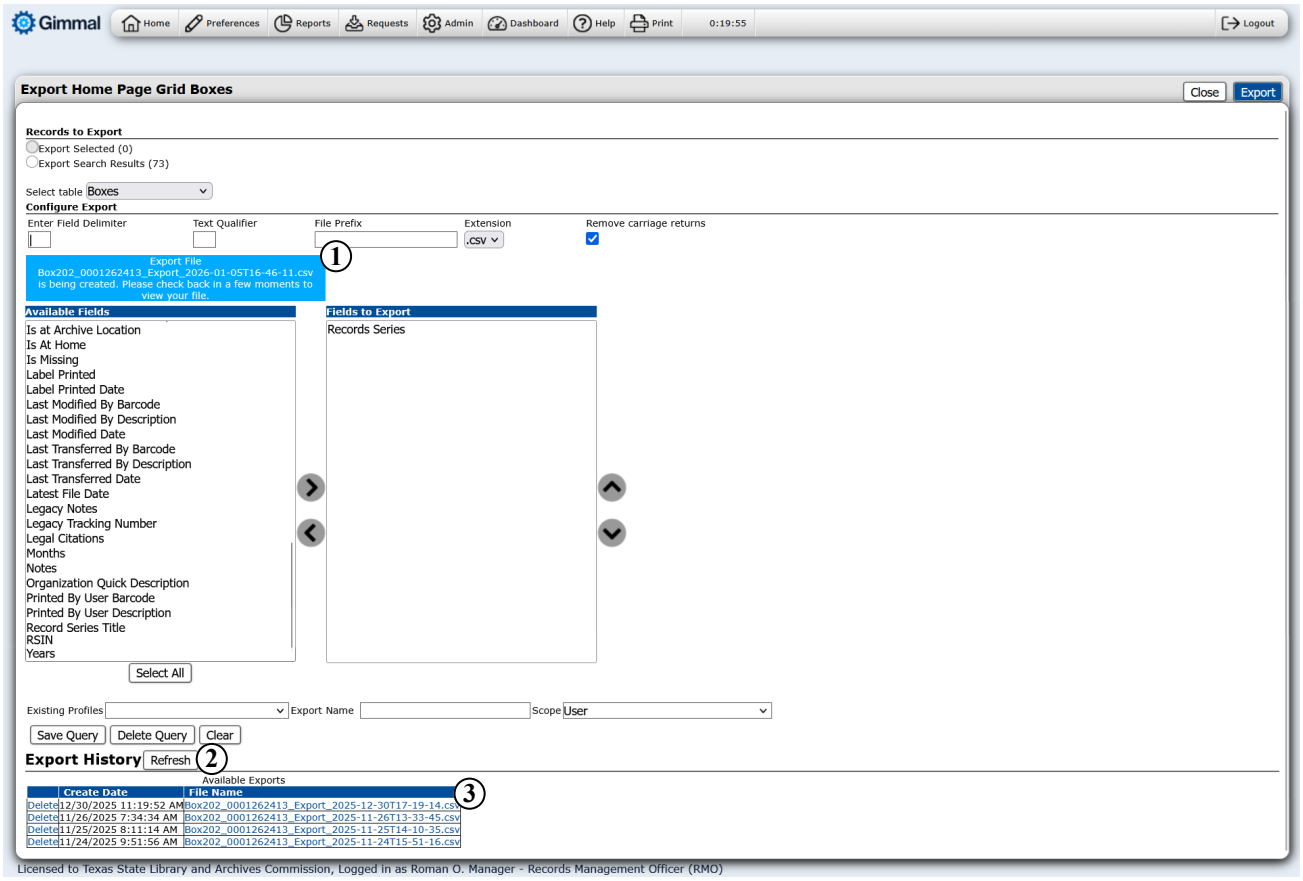
When the search results appear, click on **Export**. Do not select any of the checkboxes since all items will be exported.

Export screen, select Records Series and Export



On the Export Home Page Grid Boxes screen, the total number of items 73 from the home page search is shown **(1)** and selected (it appears as a white radio button), scroll down **(2)** the **Available Box Fields** column and double click **(3)** on **Records Series** (this is a combination of AIN and the Record Series Title). This moves the field **Box Fields to Export** column **(4)**. Next, click once **(5)** on **Export**.

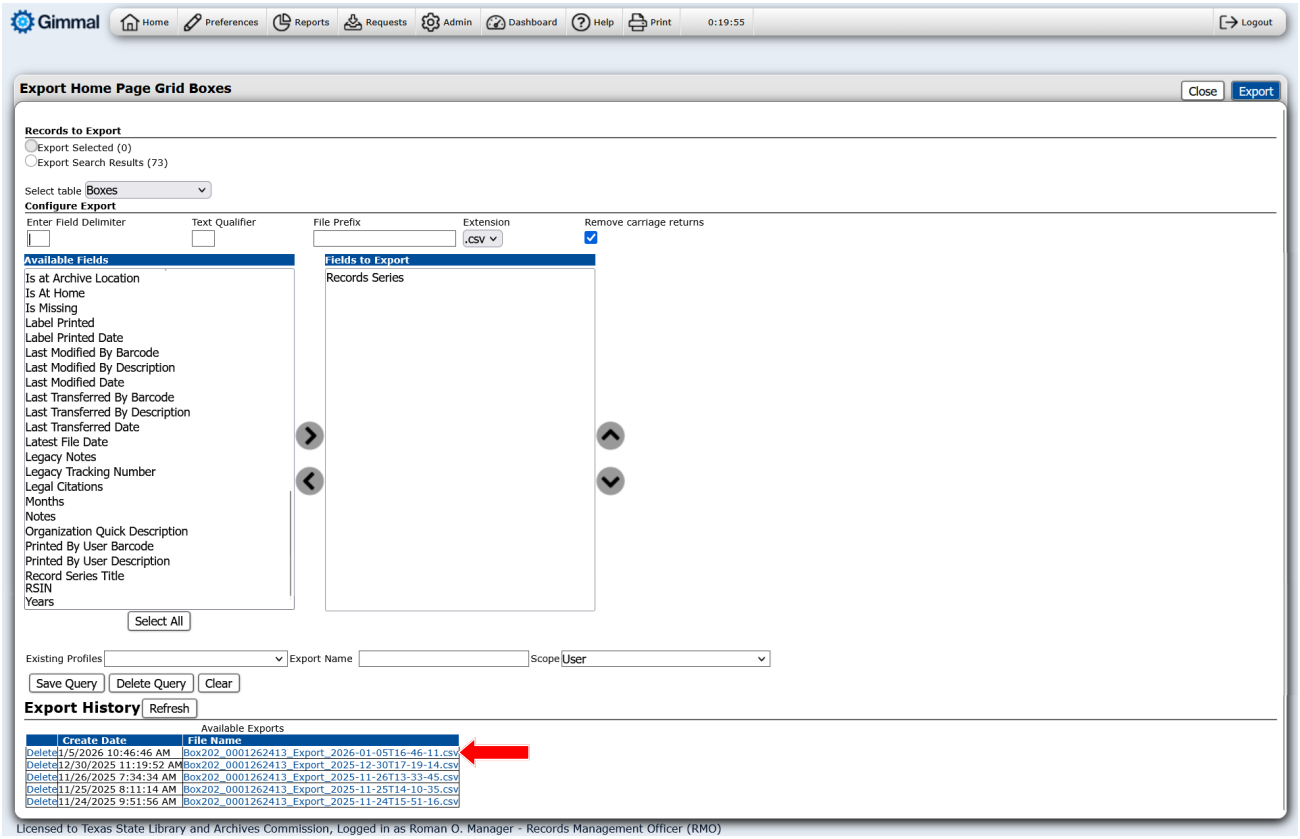
Export screen, blue popup message, Refresh



A blue information box **(1)** will show the export file name being generated. In this case, the file name is **Box202_0001262413_Export_2026-01-05T16-46-11.csv**

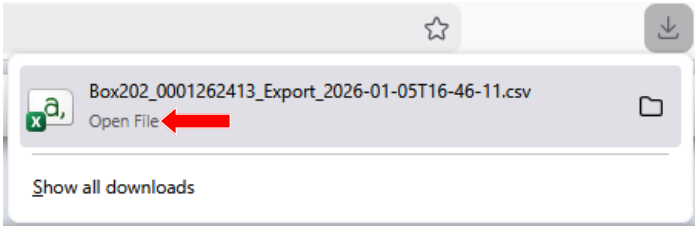
Click **(2)** the **Refresh** button until the file name appears in the **Available Exports** section **(3)**. Depending on the number of items and software traffic, it might take several minutes for the export to process. If there are other file names in this section, they are exports that were processed in the past. Click **Delete** in the left column to remove previous exports if they are not needed.

Select export file in Available Exports



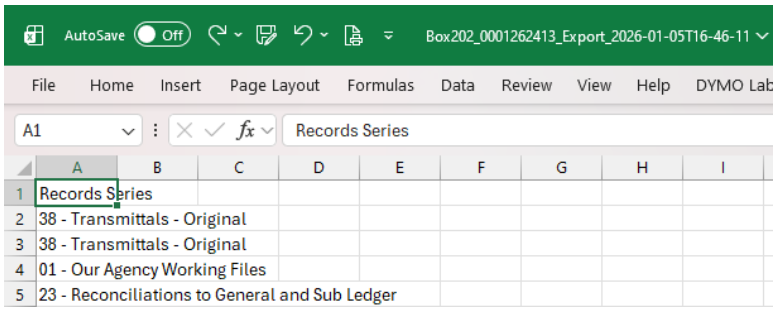
When the filename appears in **Available Exports**, click once on the file name.

Open export file



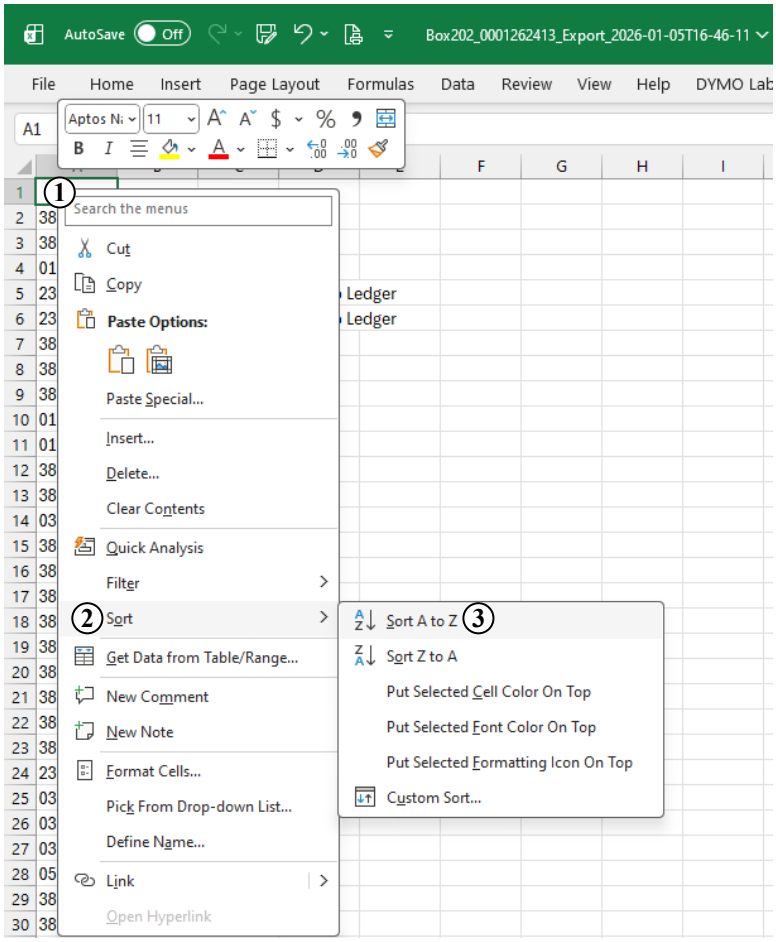
The web browser used will depend upon how the download file appears near the top of the screen. Firefox is shown above. To see an example of how this appears in Microsoft Edge, please see Page 290. Click once on **Open File**.

Excel worksheet opens



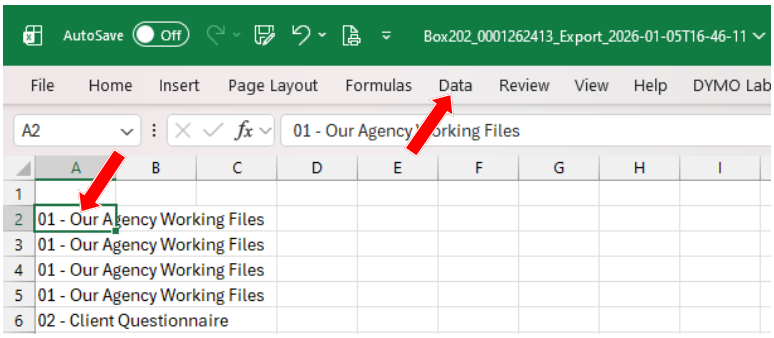
The excel worksheet opens. The first cell is selected with the **Records Series** field label, click **Delete** on the keyboard to delete the data in this field.

Sort the data

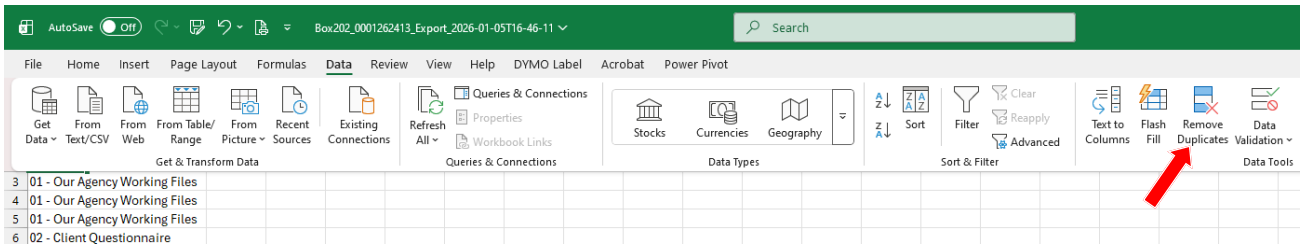


The Records Series items need to be sorted. With the first cell (now empty), still selected, right click the mouse within that cell. A menu will show **(1)**. Scroll down and hover the mouse **(2)** over **Sort**. Another menu will show on the right. Click once **(3)** on **Sort A to Z** (depending on the version of Excel, it might say **Sort Smallest to Largest**).

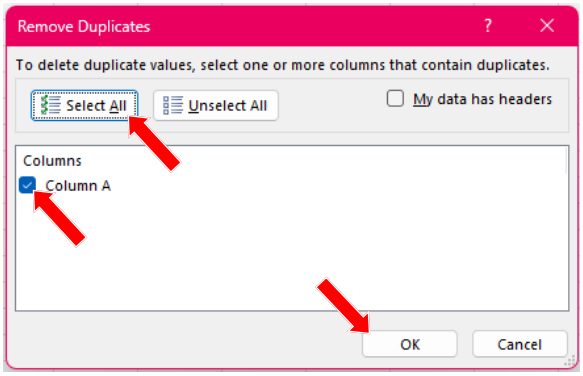
Eliminate duplicates



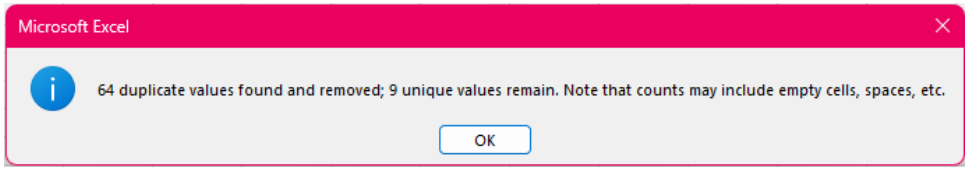
With the information sorted, the duplicates need to be removed so that there is a list of unique Records Series. Click once into the first cell with data, then click once on the **Data**.



When the **Data Tools** section shows, click once on **Remove Duplicates**.

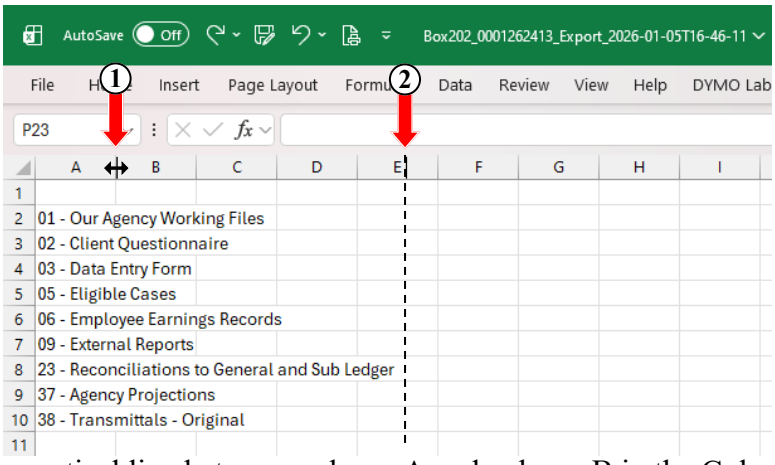


The popup **Remove Duplicates** will show. Make sure **Select All** and the checkbox for **Column A** are both selected like this example. Click once on **OK**.

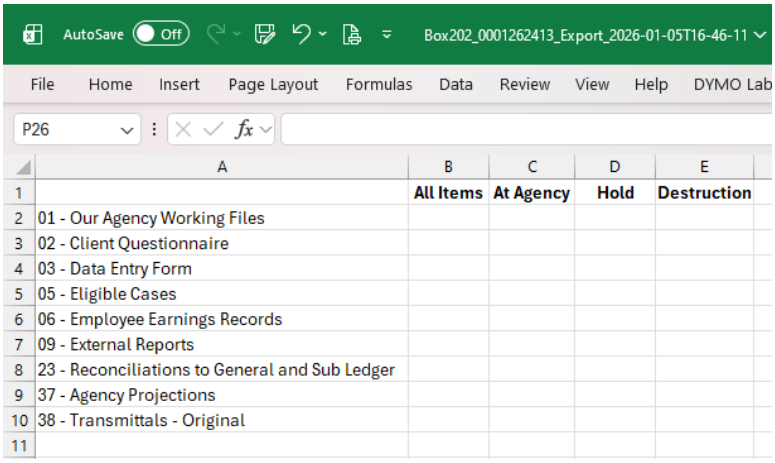


The next popup shows how many duplicate values were removed and how many uniqie values remain. Click once on **OK**.

Format the worksheet columns



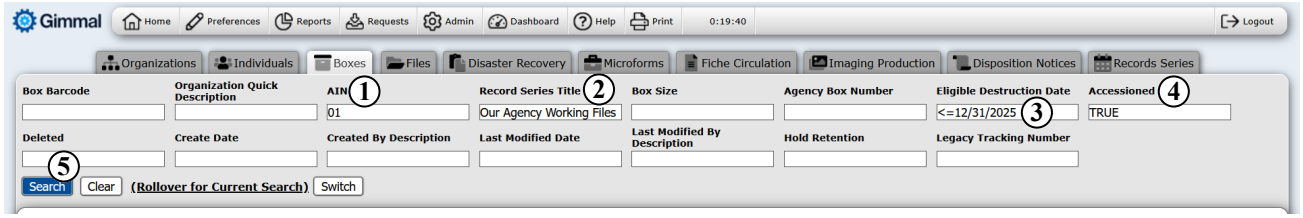
Click once on **(1)** the vertical line between column A and column B in the Column Heading section (a cross symbol with arrows pointing left and right will show) then while still holding down the mouse, drag it right just past the longest line of data **(2)**.



On the top line, enter **All Items** as the header for column B, **At Agency** as the header for column C, **Hold** as the header for column D, and **Destruction** as the header for column E. Additional formatting (as seen in this example) like bold or centering can be done for the headers, as well, but not required.

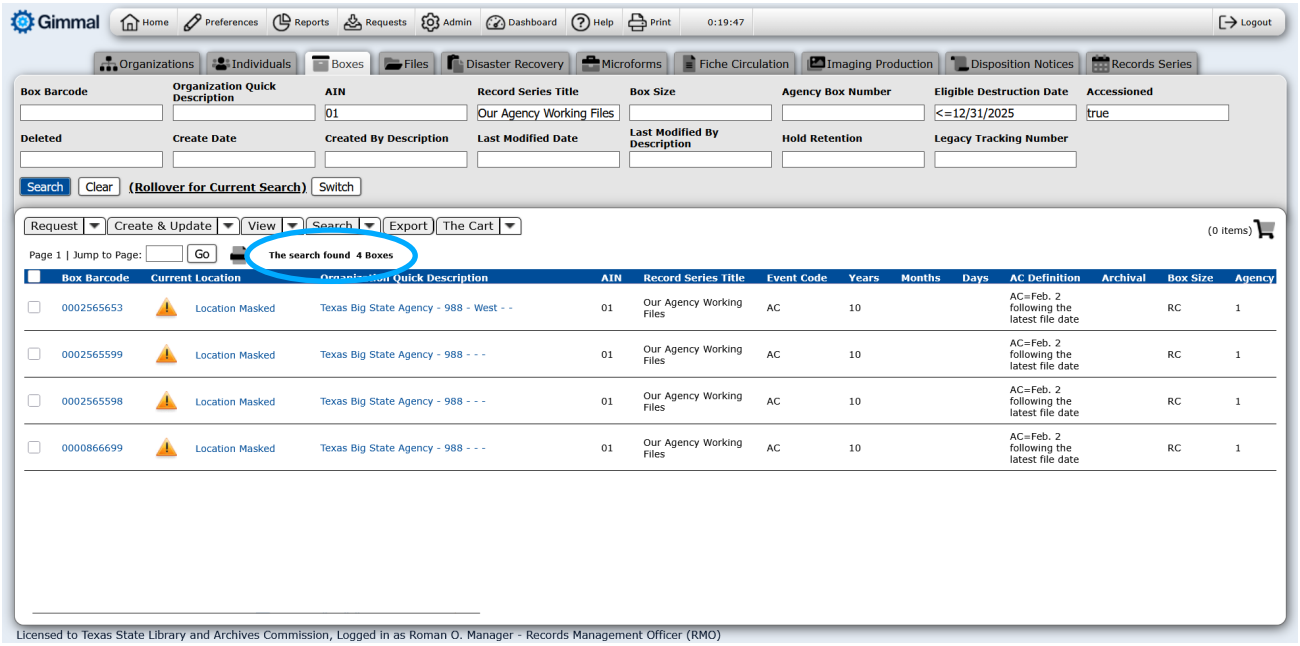
Research the Records Series in Gimmal

Search for all items for the first Records Series



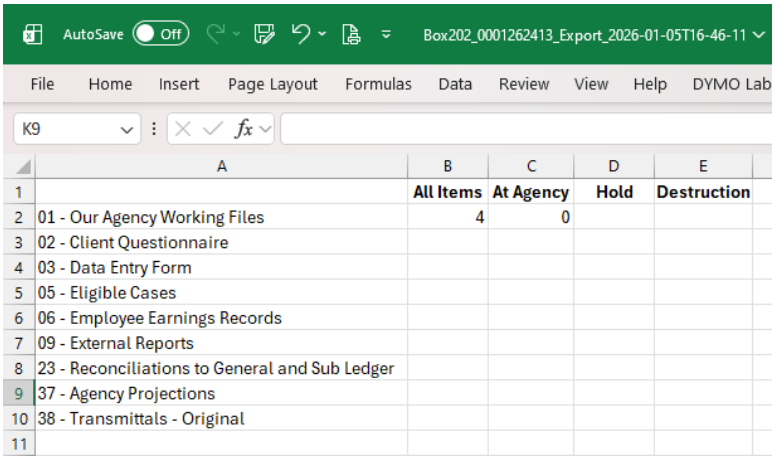
Keep the Excel worksheet open in another window or print it out. In the **AIN** field **(1)**, type the Agency Item Number for the first Records Series. Next, copy the Records Series Title from the worksheet and paste it **(2)** into the **Record Series Title** field (make sure no space is before or after the information). Using the AIN and the Record Series Title makes the search more exact. Use the Target Date used throughout this process in the **Eligible Destruction Date** field **(3)** preceded with <= . Next, type **True** in the **Accessioned** field **(4)**. Then click once **(5)** on **Search**.

Search results for the Records Series



This search found 4 items.

Worksheet: Enter data into All Items column

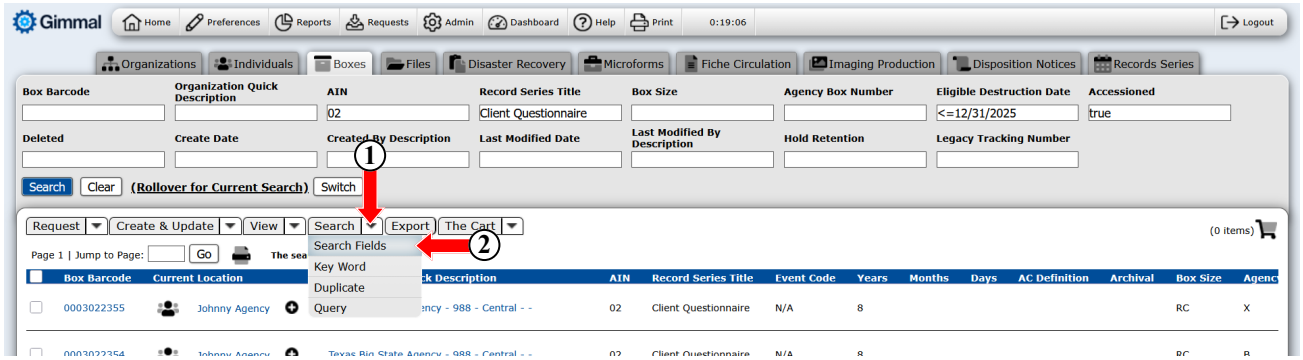


Enter the number of items for the first AIN into the **All Items** column. All of the items are in the SRC since the ⚠ symbol is in the **Current Location** column on the Gimmal home page. If all items are at the SRC, enter **0** in the **At Agency** column and go to the next AIN.

If all items for each AIN have no items at the agency, continue to Page 315.

If there are items at the agency for any AIN, an individual's name will be in the Current Location column, continue on Page 313.

Are any Accessioned items at the agency?



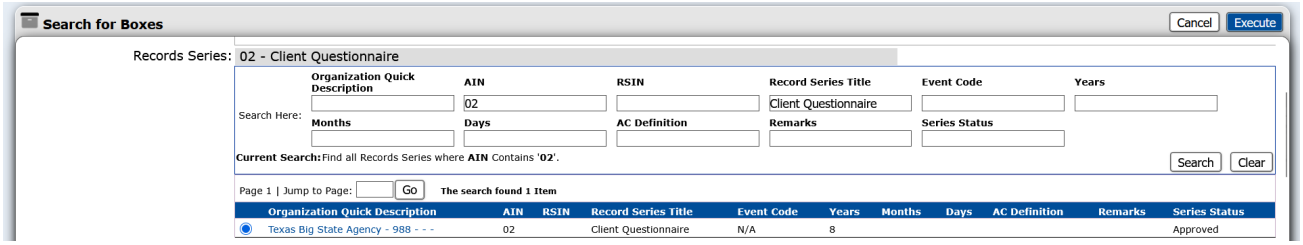
Click once **(1)** on **Search** dropdown, click once **(2)** on **Search Fields**.

Search for Accessioned items at the agency

These fields will be used on the Search screen:

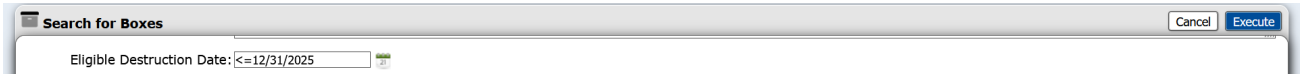
- Records Series
- Eligible Destruction Date
- Accessioned
- Is At Home

Search Field: Records Series



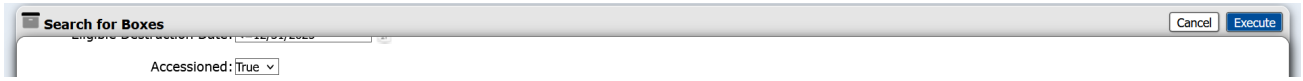
Use the AIN and Record Series Title fields and click **Search** to find the Records Series. Select the Records Series by clicking the radio button.

Search Field: Eligible Destruction Date



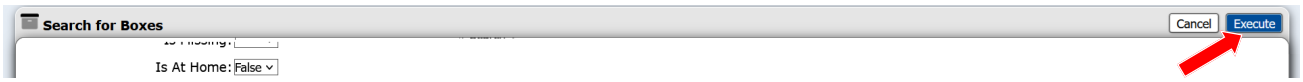
Use the same Target Date used throughout this process using the <= symbols.

Search Field: Accessioned



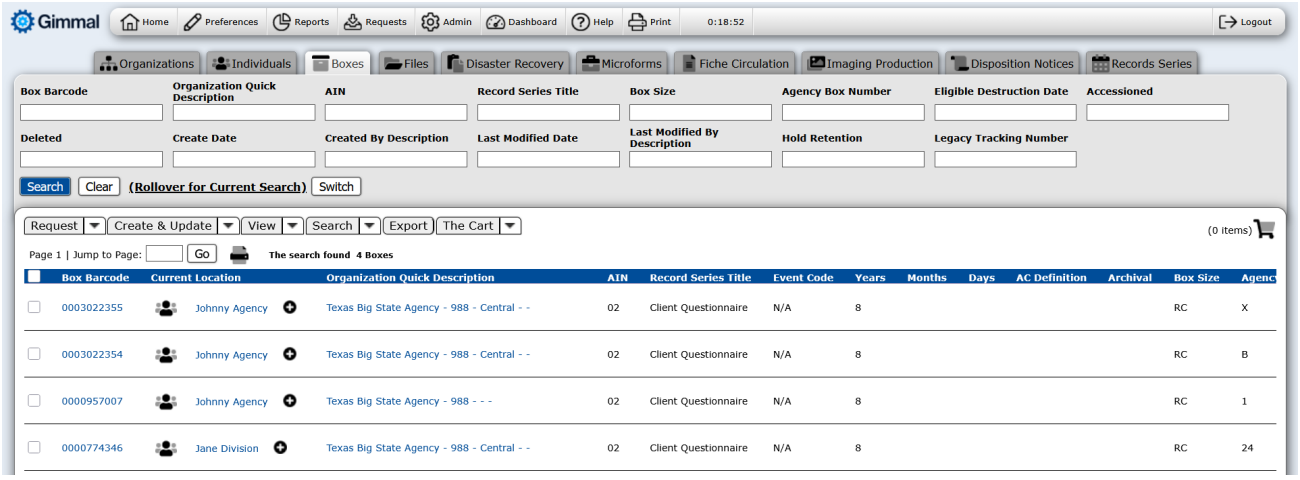
Select **True** from the dropdown menu.

Search Field: Is At Home (scroll down to the Gimmal System Fields section)



Select **False** from the dropdown menu since the items are not in their Home Location at the SRC. Then, click once on **Execute**.

Search results: Accessioned items that are at the agency



These items will need to be returned to the SRC to process for destruction or they will need to be email requested permanent transfer. Stop this process at this time and restart once these items are resolved using one of the below methods.

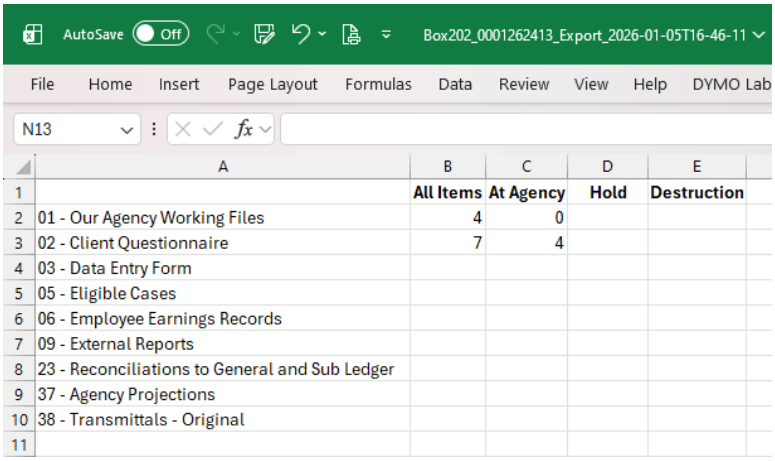
Destruction

If the items need to be returned to the SRC for destruction, turn to ***Request Pickup: Send/Return Items to the SRC*** (Page 93) to request pickup. Once the items are assigned to a shelf at the SRC, restart this process from the beginning.

Permanent Withdrawal

To handle destruction for the item(s) at the agency, turn to ***Supplemental Information: Delete or Permanent Withdrawal*** (Page 217) and follow the directions at the bottom of page 217 to send an email to the SRC Manager. When the SRC Manager confirms the Permanent Withdrawal has been completed, restart this process from the beginning.

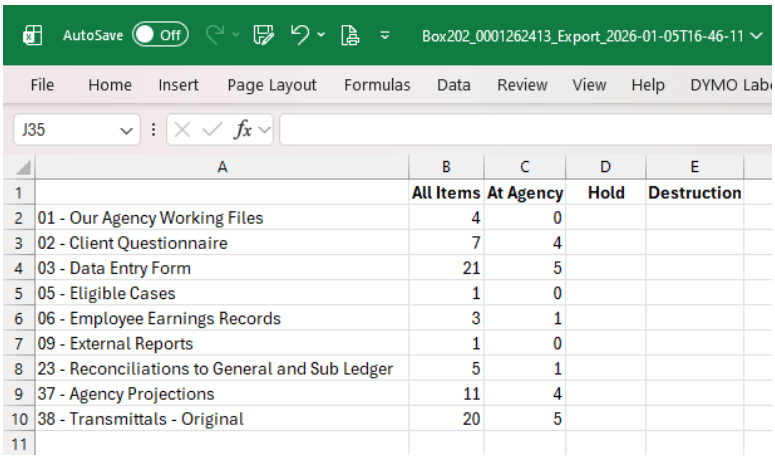
Worksheet: Enter items that are at the agency



	A	B	C	D	E
1		All Items	At Agency	Hold	Destruction
2	01 - Our Agency Working Files	4	0		
3	02 - Client Questionnaire	7	4		
4	03 - Data Entry Form				
5	05 - Eligible Cases				
6	06 - Employee Earnings Records				
7	09 - External Reports				
8	23 - Reconciliations to General and Sub Ledger				
9	37 - Agency Projections				
10	38 - Transmittals - Original				
11					

When accessioned items are at the agency, enter the amount in the **At Agency** column.

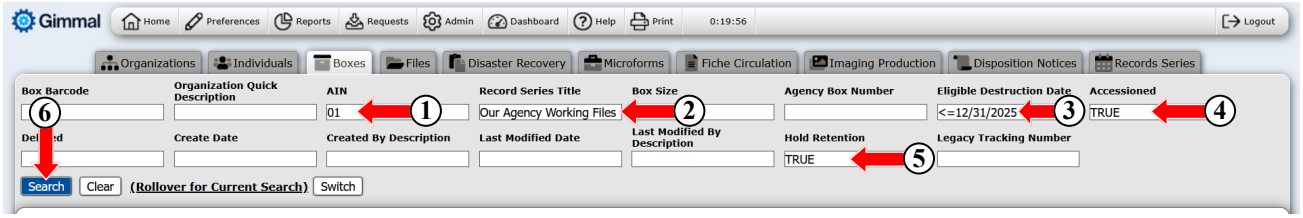
Worksheet progress after reviews for All Items and At Agency



	A	All Items	At Agency	Hold	Destruction
1					
2	01 - Our Agency Working Files	4	0		
3	02 - Client Questionnaire	7	4		
4	03 - Data Entry Form	21	5		
5	05 - Eligible Cases	1	0		
6	06 - Employee Earnings Records	3	1		
7	09 - External Reports	1	0		
8	23 - Reconciliations to General and Sub Ledger	5	1		
9	37 - Agency Projections	11	4		
10	38 - Transmittals - Original	20	5		
11					

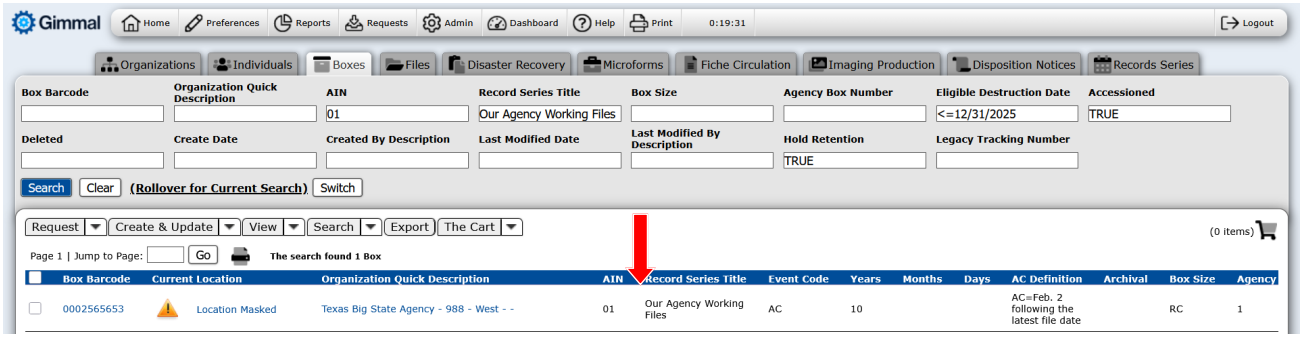
The worksheet will look something like this after the first two review steps are completed.

Search for items on hold



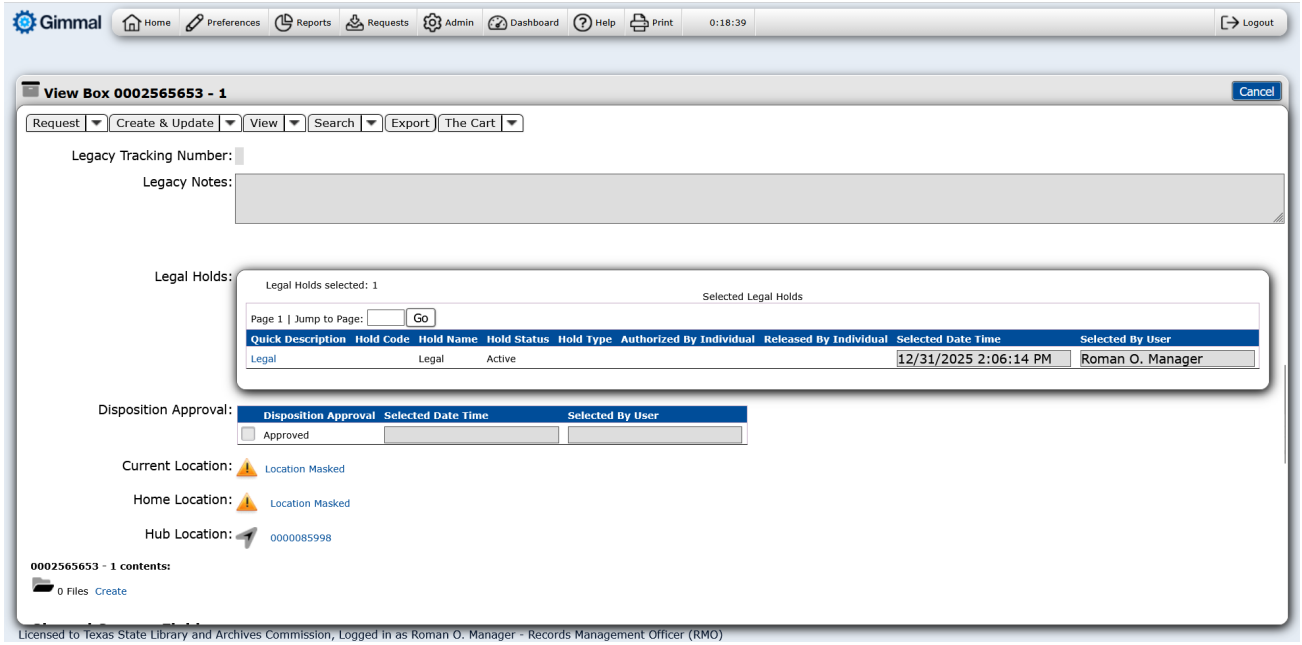
Sometimes, unbeknownst to the RMO or RML, an agency employee will place an accessioned item on hold for whatever reason. Placing an item on hold in Gimmal excludes the item from the destruction picklist at the SRC (it will remain in its location). Check to see if any accessioned items for the same Target Date have already been placed on hold in Gimmal. In the Quick Search fields (at the top of the screen), enter the Agency Item Number in the **AIN** field **(1)**, enter the Records Series Title in the **Records Series Title** field **(2)**, enter in the **Eligible Destruction Date** field **(3)** the less than symbol < and the equal symbol = followed by the Target Date (the same latest Eligible Destruction Date used earlier.) with no spaces, then type **True** in the **Accessioned** field **(4)**, type True in the **Hold Retention** field **(5)** (when viewing the item in Gimmal, this is a checkbox that becomes activated when items are placed on hold—designated as True here) and click once **(6)** on **Search**.

Review item(s) placed on hold



To review item(s) placed on hold, click once on the item's barcode number to go to the View screen.

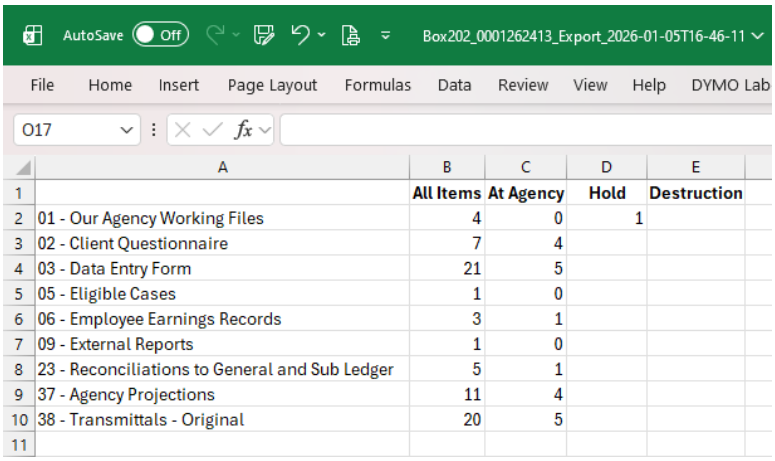
Review an item on hold



To review the hold placed on an item, scroll down the screen to the **Legal Holds** section. If the hold needs to remain, move on to the next item to review.

If the hold needs to be changed or removed, please turn to **Supplemental Information: Hold** and find the section to change a hold (**Place a single item on hold: Update**, Page 199) or to remove a hold (**Remove hold for one item: Update**, Page 205). If the hold is removed, be sure to delete any information in the **Hold Retention Comments** field.

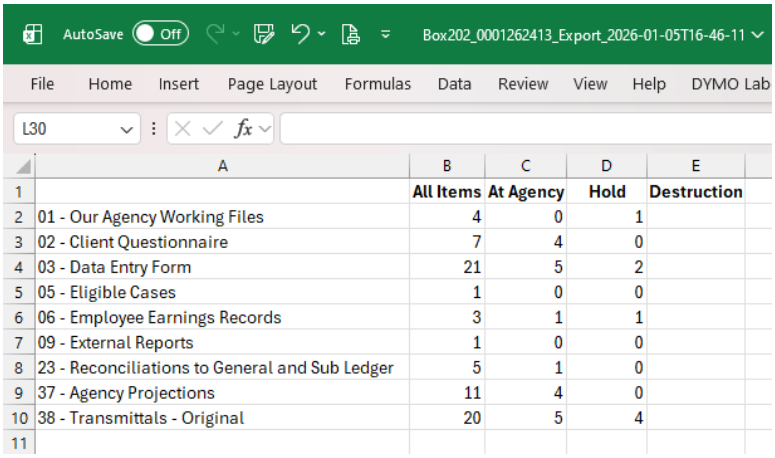
Worksheet: Enter hold item(s)



	A	B	C	D	E
1		All Items	At Agency	Hold	Destruction
2	01 - Our Agency Working Files	4	0	1	
3	02 - Client Questionnaire	7	4		
4	03 - Data Entry Form	21	5		
5	05 - Eligible Cases	1	0		
6	06 - Employee Earnings Records	3	1		
7	09 - External Reports	1	0		
8	23 - Reconciliations to General and Sub Ledger	5	1		
9	37 - Agency Projections	11	4		
10	38 - Transmittals - Original	20	5		
11					

After a review is completed to confirm or remove hold for items in Gimmal for accessioned items, enter the amount in the **Hold** column. Continue this review for each Records Series on the worksheet.

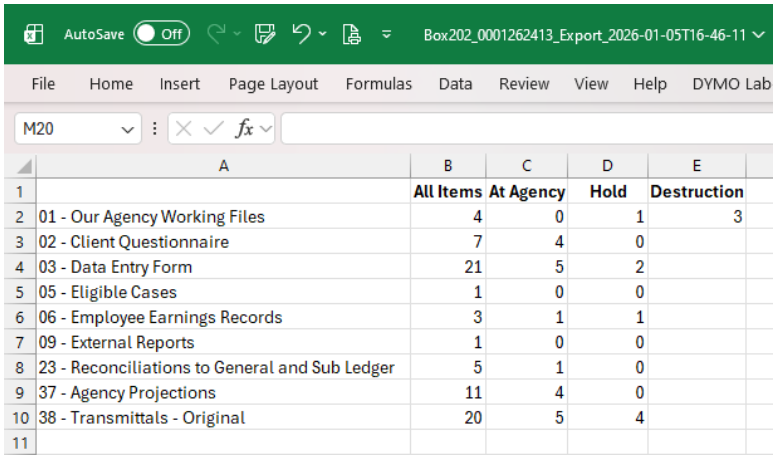
Worksheet progress after reviews for All Items, At Agency, and Hold



	A	B	C	D	E
1		All Items	At Agency	Hold	Destruction
2	01 - Our Agency Working Files	4	0	1	
3	02 - Client Questionnaire	7	4	0	
4	03 - Data Entry Form	21	5	2	
5	05 - Eligible Cases	1	0	0	
6	06 - Employee Earnings Records	3	1	1	
7	09 - External Reports	1	0	0	
8	23 - Reconciliations to General and Sub Ledger	5	1	0	
9	37 - Agency Projections	11	4	0	
10	38 - Transmittals - Original	20	5	4	
11					

The worksheet will look something like this after the first three review steps are completed.

Calculate the review worksheet for destruction

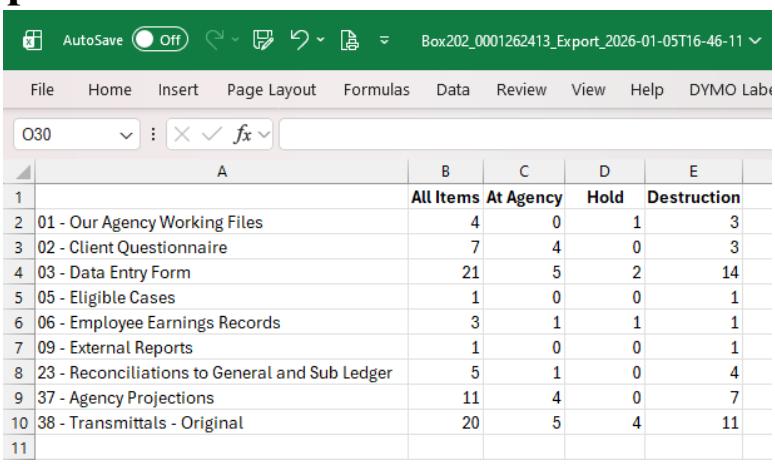


	A	B	C	D	E
1		All Items	At Agency	Hold	Destruction
2	01 - Our Agency Working Files	4	0	1	3
3	02 - Client Questionnaire	7	4	0	
4	03 - Data Entry Form	21	5	2	
5	05 - Eligible Cases	1	0	0	
6	06 - Employee Earnings Records	3	1	1	
7	09 - External Reports	1	0	0	
8	23 - Reconciliations to General and Sub Ledger	5	1	0	
9	37 - Agency Projections	11	4	0	
10	38 - Transmittals - Original	20	5	4	
11					

To complete the **Destruction** column, use this calculation formula:

All Items
- At Agency
- Hold
Destruction

The completed review worksheet for boxes destruction

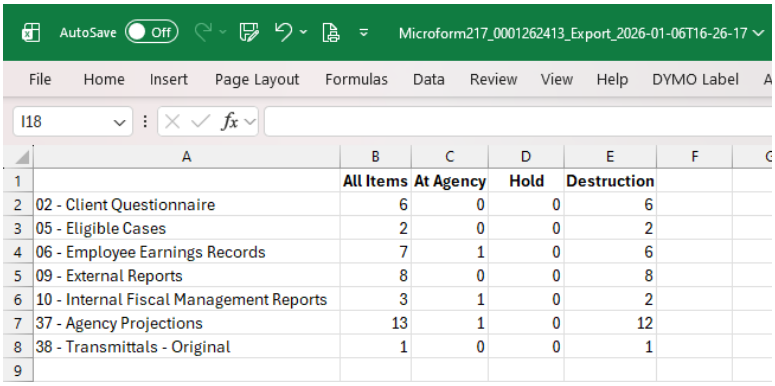


	A	B	C	D	E
1		All Items	At Agency	Hold	Destruction
2	01 - Our Agency Working Files	4	0	1	3
3	02 - Client Questionnaire	7	4	0	3
4	03 - Data Entry Form	21	5	2	14
5	05 - Eligible Cases	1	0	0	1
6	06 - Employee Earnings Records	3	1	1	1
7	09 - External Reports	1	0	0	1
8	23 - Reconciliations to General and Sub Ledger	5	1	0	4
9	37 - Agency Projections	11	4	0	7
10	38 - Transmittals - Original	20	5	4	11
11					

This is the completed worksheet for boxes.

Now, start the process from Page 303 for Microforms (if there are any for destruction).

The completed review worksheet for microforms destruction



	A	B	C	D	E	F
1		All Items	At Agency	Hold	Destruction	
2	02 - Client Questionnaire	6	0	0	6	
3	05 - Eligible Cases	2	0	0	2	
4	06 - Employee Earnings Records	7	1	0	6	
5	09 - External Reports	8	0	0	8	
6	10 - Internal Fiscal Management Reports	3	1	0	2	
7	37 - Agency Projections	13	1	0	12	
8	38 - Transmittals - Original	1	0	0	1	
9						

The process for microforms was not displayed in these instructions, but the steps are the same as for boxes.

The decision for destruction

There are nine records series for boxes and eight records series for microforms that are available for destruction.

The records management team can make the final call about what is actually processed for destruction. The SRC will not dispose any items on hold or that the agency does not request for destruction.

In this case, it was determined that only two records series would be requested for destruction:
01 - Our Agency Working Files and **38 - Transmittals-Original**.

The other items will remain at the SRC until they are requested for destruction at some point in the future.

II. SUBMIT THE DESTRUCTION REQUEST EMAIL

When it is time to let the SRC Manager know that there are items for destruction, use email to send the destruction request. This email can be sent by the Records Management Officer or the Records Management Liaison assigned to that role in Gimmal. No one else at the agency can send a destruction request. The email illustration is explained with number labels:

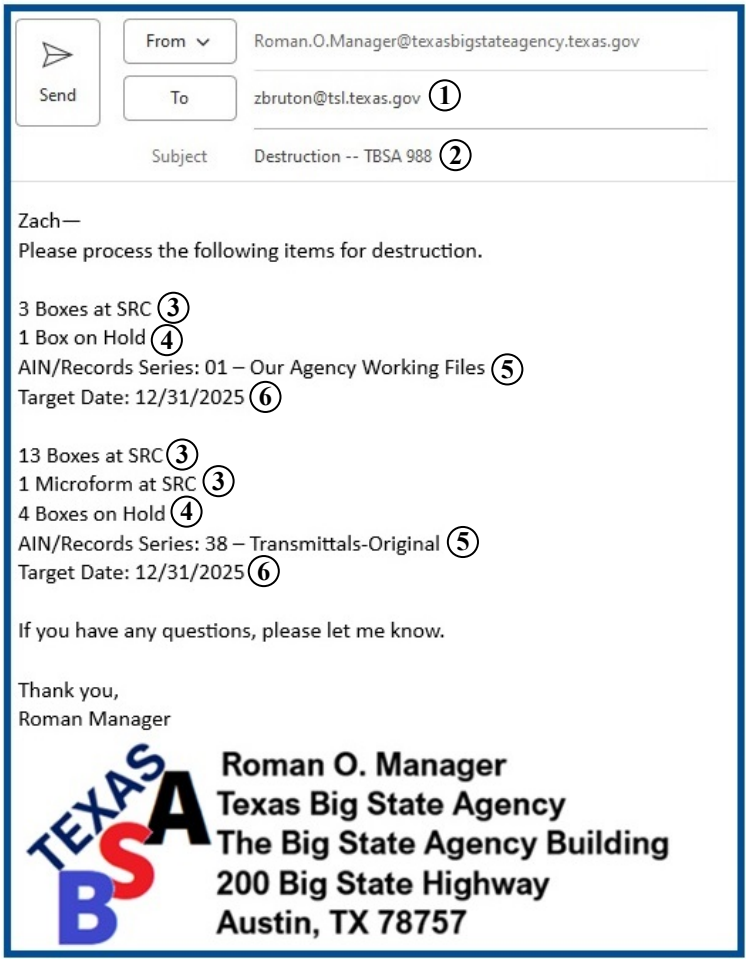
1. Address the email to the SRC Manager. As of publication revision date, the SRC Manager is Zach Bruton, email address: zbruton@tsl.texas.gov
2. Subject: Destruction Request (Destruction Request, Agency Acronym - Agency Code)

In the body of the email, use data from the worksheet to provide in this specific order:

3. Total number of accessioned boxes/microforms (be sure to separate those numbers by medium) not placed on hold to be processed through destruction for the Record Series (Agency Item Number (AIN) / Record Series Title). On the worksheet, this is the number from the Destruction column.
4. (If needed) Total number of boxes/microforms (be sure to separate those numbers by medium) placed on hold for the Record Series (AIN / Record Series Title). On the worksheet, this is the number from the Hold column.
5. Record Series (AIN / Record Series Title).
6. Target Date (all accessioned items for this AIN / Record Series Title until this date not on hold will be processed for destruction).

Repeat this process for each Record Series. Below is an illustration of a destruction request email for two Record Series (AIN 01 is for one medium type with hold information and AIN 38 is for two media types with hold information for boxes, but no hold information for microforms).

For information about how to send an optional itemized worksheet, please turn to Page 321.



The SRC process after the destruction request email is sent

When the RMO or the RML sedns the destruction request email to the SRC Manager, the duties at the agency are complete. When the SRC Manager receives the email, the request is placed in queue with other destruction requests and will be processed in the order received (unless problems arise with the request). The SRC Inventory Coordinator will assign the request to a Destruction Batch Number. If the RMO sends the destruction request, only the RMO will receives replies from the SRC Manager. If an RML sends the destruction request, the RMO is copied on all correspondence sent by the SRC Manager. The SRC Manager will reply with a notification of receipt.

When the destruction process is complete at the SRC, the SRC Manager will send to the RMO (or the RML and RMO if the RML submitted the destruction request) another email with the Disposition Certificate(s) attached detailing each item processed through destruction. Once items are marked for destruction in Gimmal, they are not viewable on the item tab (boxes or microforms) in Gimmal. This Destruction Batch Number can be used on the Disposition Notices tab in Gimmal to view the Disposition Certificate.

III. VIEW DISPOSITION INFORMATION IN GIMMAL

Once the destruction request is completed at the SRC and the agency's Records Management Officer has received the Disposition Certificate(s) from the SRC Manager, the disposition information can be accessed in Gimmal.

Disposition history for all agencies in Gimmal starts when the previous storage iteration TexLinx was launched in May 2015. If disposition history is needed prior to May 2015, please contact the SRC Manager.

To view all destruction information for the agency, click the **Search** button without entering data into any quick search fields.

A search on the Disposition Notices tab in Gimmal for a Destruction Batch Number will provide information for the destruction request in three types of documents: Disposition Picklist, Disposition Approval. and a Disposition Certificate. All documents are in Portable Document Format (PDF).

- **Disposition Picklist** is used by an SRC employee to pull items from the shelves.
- **Disposition Approval** is the complete list in this Batch for each Organization. This list also includes those items that were placed on hold (they were not destroyed).
- **Disposition Certificate** is a list for all items processed through destruction. This list does not include those items placed on hold.

Of the three documents, the Disposition Certificate is the most important one.

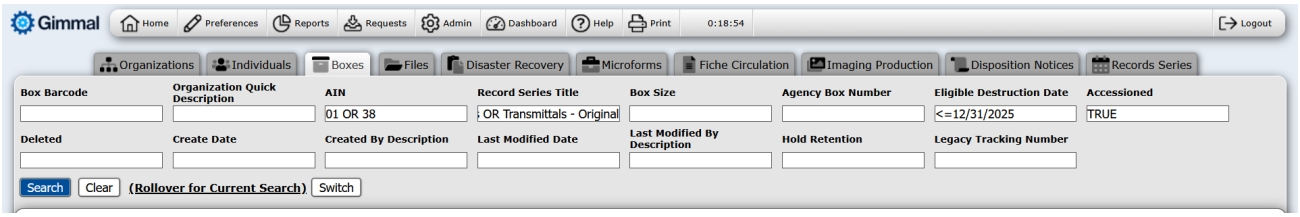
To view any of these documents, click once on the Disposition Notices tab near the top of the screen then enter in the Destruction Batch # field the Destruction Batch Number provided in the email document from the SRC Manager, then click once on Search. When information populates on the Disposition Notices home page, click once on the pdf link in the File Name column to view the document.

IV. Optional: Create an Itemized Worksheet to include with the destruction request email

Sometimes, not every AIN with items eligible for destruction will be requested to be processed for destruction. Once it is determined which AIN with items eligible for destruction will be requested for destruction, an optional step prior to working on the destruction request email is to compose a second Excel worksheet that details the items for each AIN in Gimmal that are being requested for destruction. While this worksheet is not required, it is recommended to be completed as a tool to verify the destruction email information in the email.

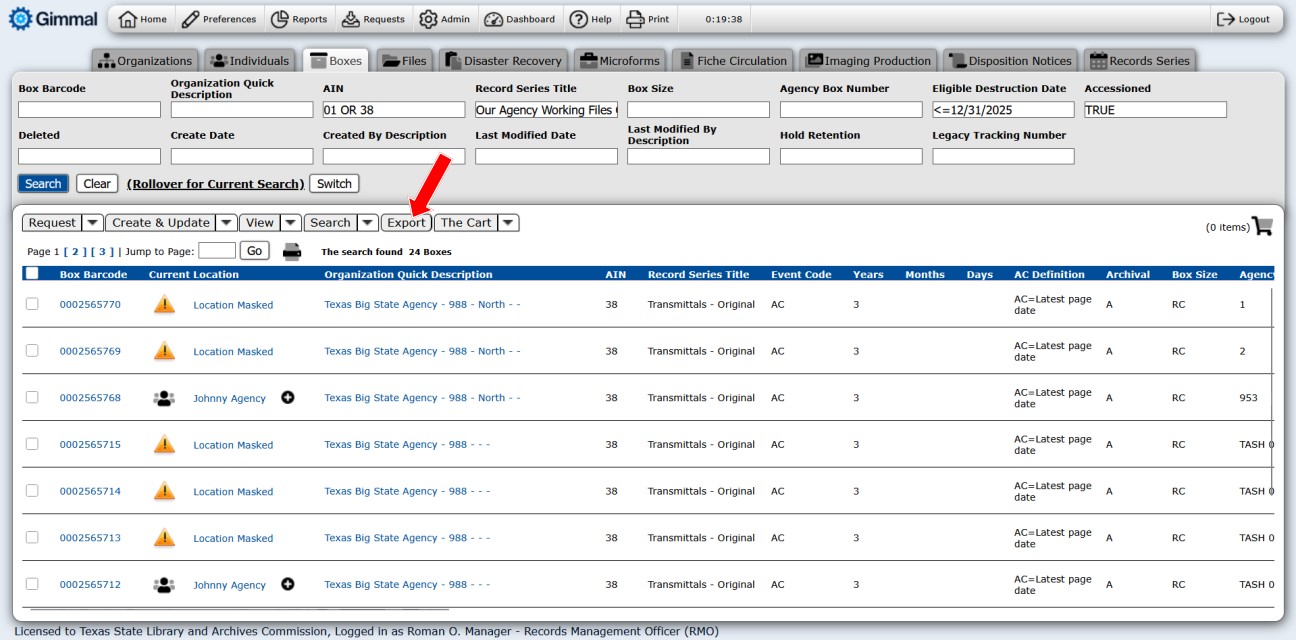
Based on the search information compiled earlier on the first worksheet for the Texas Big State Agency's items in Gimmal, the RMO wants items only for AIN 01 and AIN 38 to be processed through destruction. It has been determined that three boxes will be processed for destruction for AIN 01. And (as described in the previous steps for the first worksheet) for AIN 38, 13 boxes and one microform (the microform was not researched in these instructions) will be requested for destruction. Ten boxes are on hold.

Search for specific Records Series



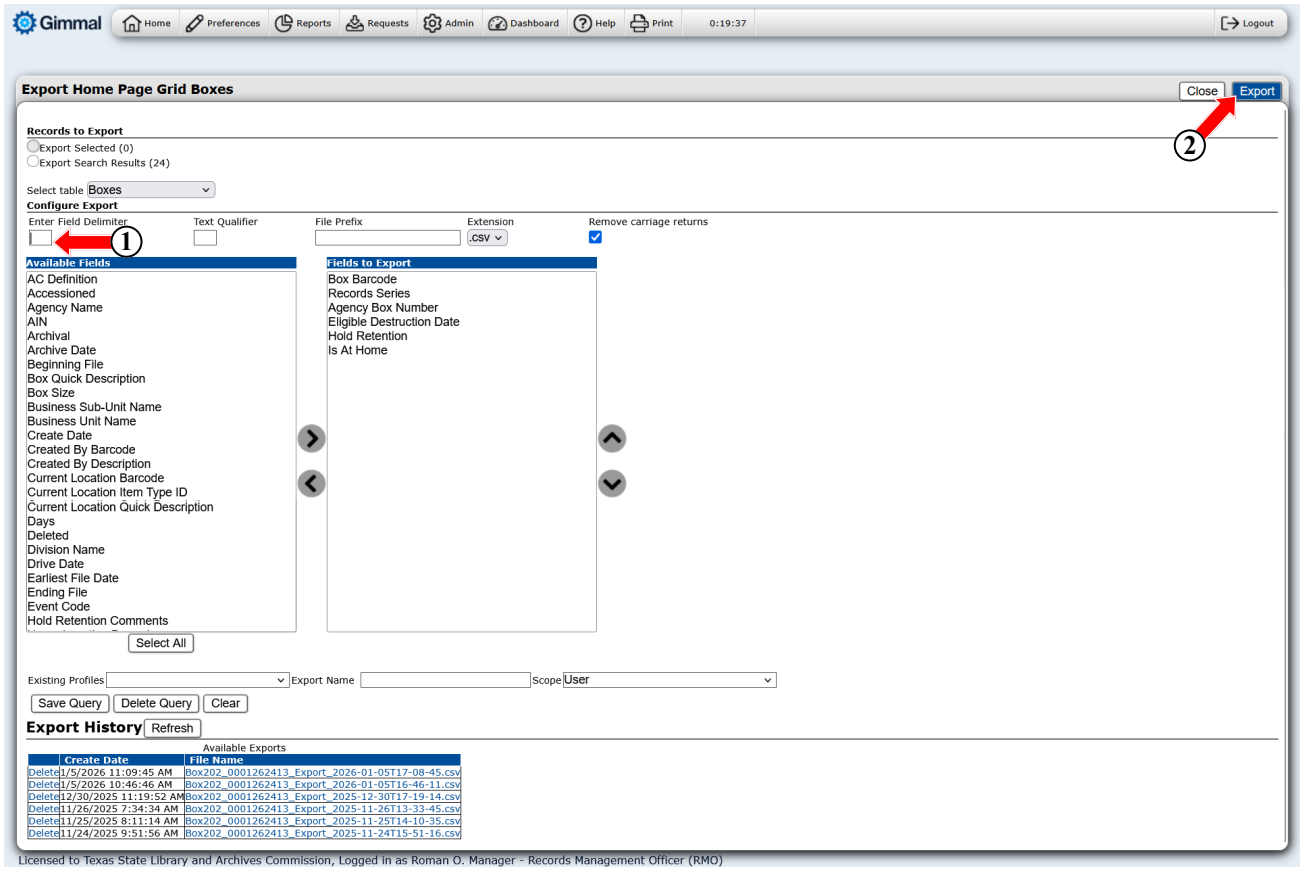
In the quick search area of the Boxes tab (or Microforms tab) in Gimmal, enter each **Agency Item Number** in the **AIN** field **(1)**. The term **OR** with a space before and after is used as a separator between search terms as seen in this example. Next, in the **Record Series Title** field **(2)**, enter the Records Series Title for each AIN, again, use **space OR space** between each Record Series Title. Next, in **Eligible Destruction Date** field **(3)**, use the same date used in the previous searches (<=12/31/2025 in this illustration); then in **Accessioned** field **(4)**, type **True**. Last, click once **(4)** on the **Search** button.

Export from the home page



Do not select any items. Click once on **Export**.

Export screen, select specific fields

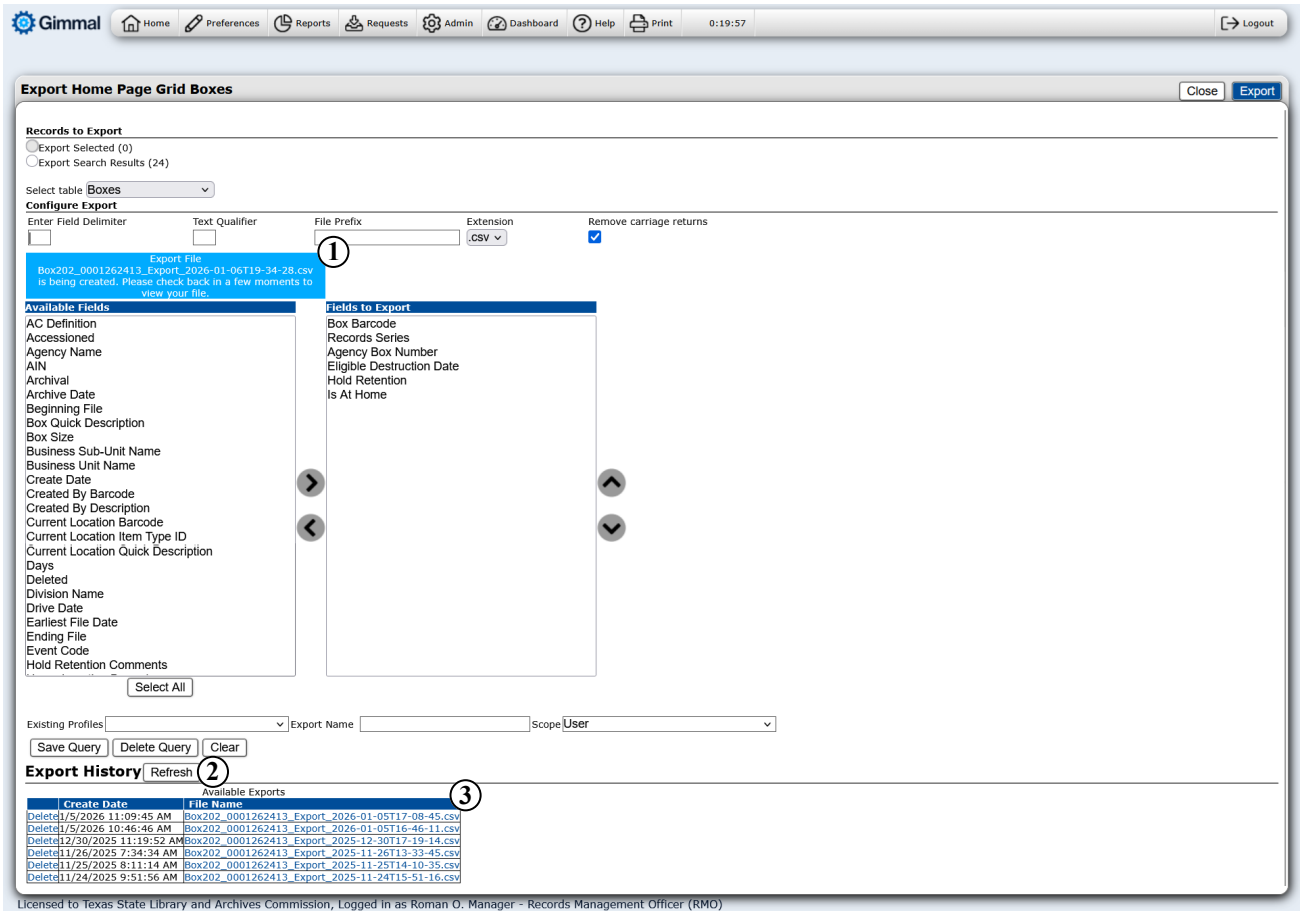


In the column Available Box Fields, the field labels that must be selected (double click on the field name) are:

- **Box Barcode** (or **Microforms Barcode** if exporting from the Microforms tab)
- **Records Series** (be sure not to click on Record Series Title)
- **Agency Box Number** (or **Agency Reel Number** for Microforms)
- **Film Size** (this is only for Microforms to identify if it is for Microfilm or Microfiche)
- **Eligible Destruction Date**
- **Hold Retention** (this will confirm items placed on hold)
- **Is At Home** (this confirms items at the SRC)

The fields in the **Fields to Export** column must be in the order listed above so they are in the correct order on the Excel worksheet. Make sure the Pipe symbol appears in **Enter Field Delimiter** field **(1)**. To create a Pipe symbol, hold down Shift on the keyboard and press the backslash key \ to create a vertical line, the Pipe. Click once **(2)** on **Export**.

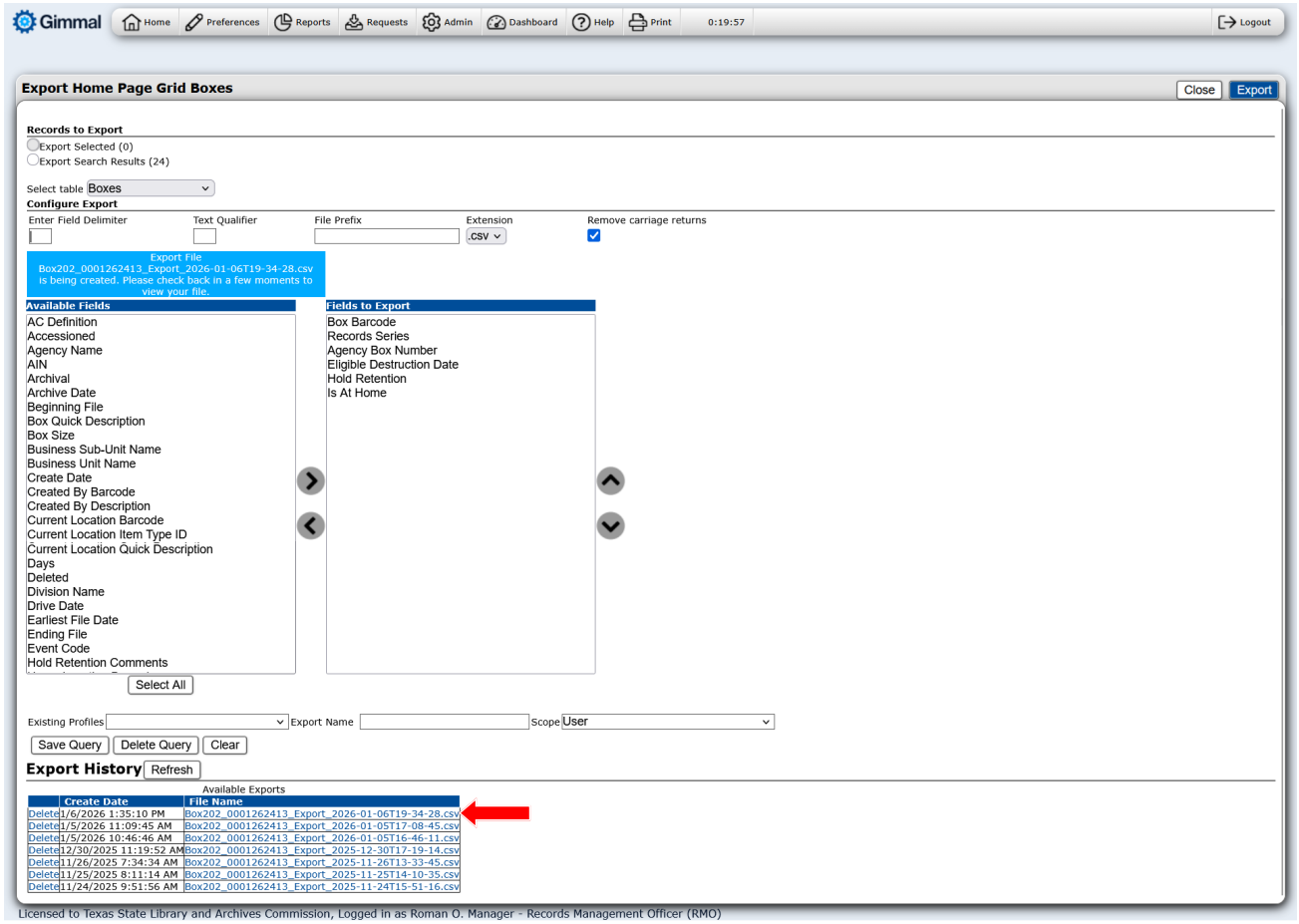
Export screen, blue popup message, Refresh



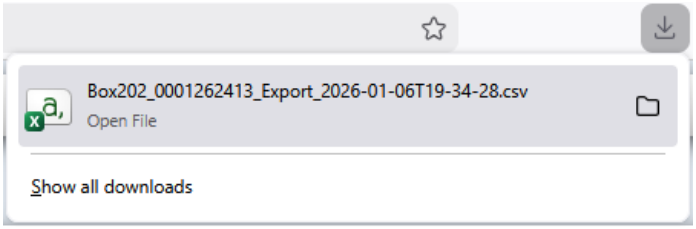
A blue information box **(1)** will show the export file name being generated. In this case, the file name is **Box202_0001262413_Export_2026-01-06T19-34-28.csv**

Click **(2)** the **Refresh** button until the file name appears in the **Available Exports** section **(3)**. Depending on the number of items and software traffic, it might take several minutes for the export to process. If there are other file names in this section, they are exports that were processed in the past. Click **Delete** in the left column to remove previous exports if they are not needed.

Select export file in Available Exports

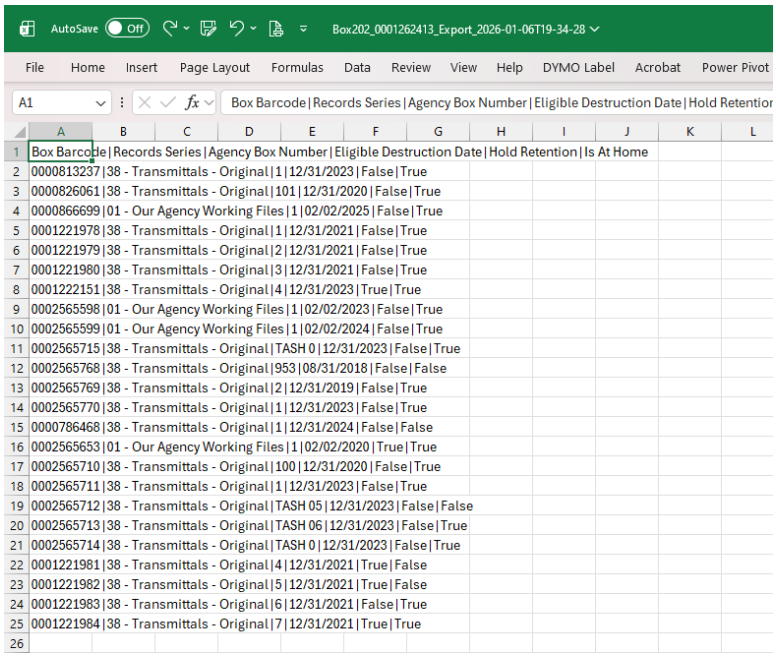


Open export file



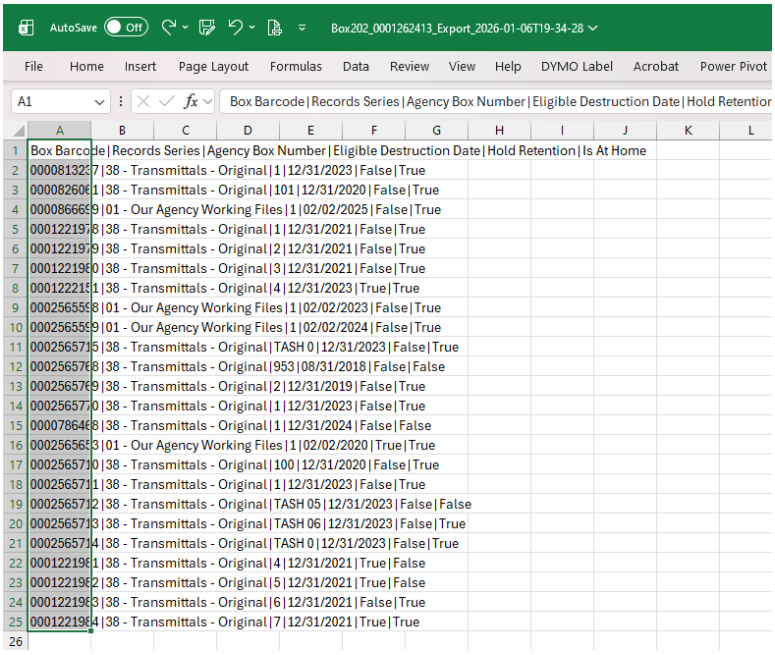
The web browser used will depend upon how the download file appears near the top of the screen. Firefox is shown above. To see an example of how this appears in Microsoft Edge, please see Page 290. Click once on **Open File**.

Excel worksheet opens



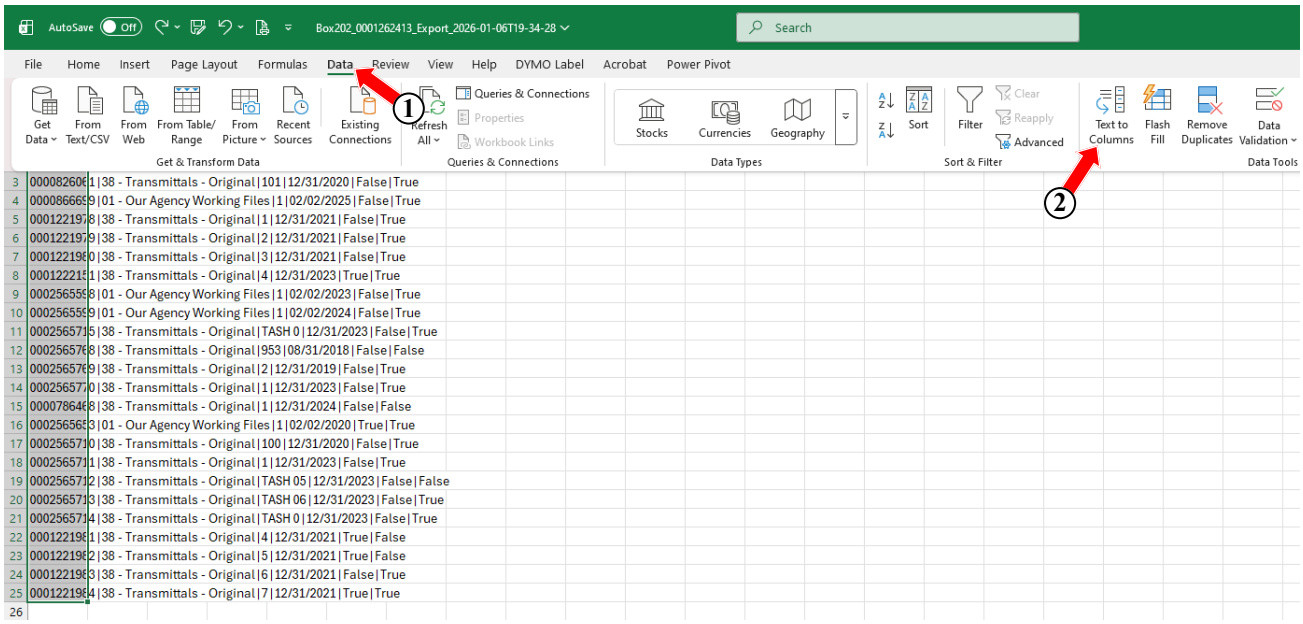
The excel worksheet opens. The first cell is selected with the **Records Series** field label, click **Delete** on the keyboard to delete the data in this field.

Select the data



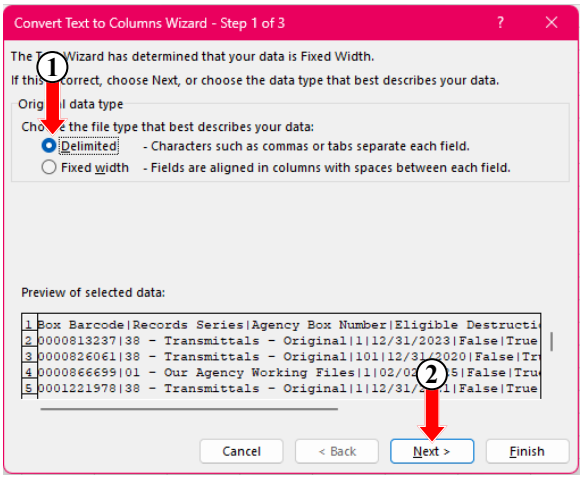
With the first cell selected, select all of the data. To do this on the keyboard, hold down **CTRL** and press **A**.

Format the data into separate columns



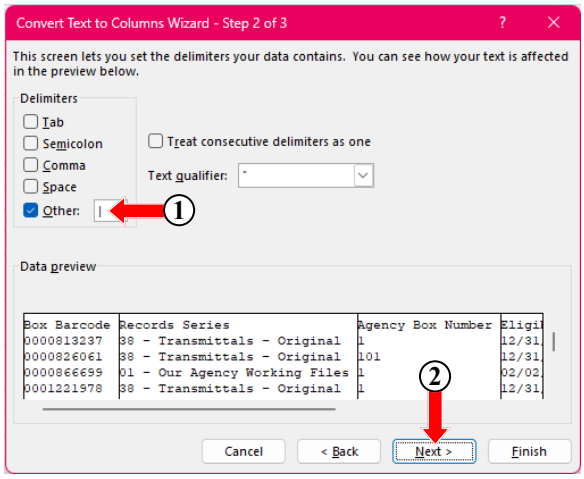
With the data selected like in the above example, click once **(1)** on **Data** then click once **(2)** on **Text To Column** in the **Data Tools** section.

Convert Text to Columns Wizard



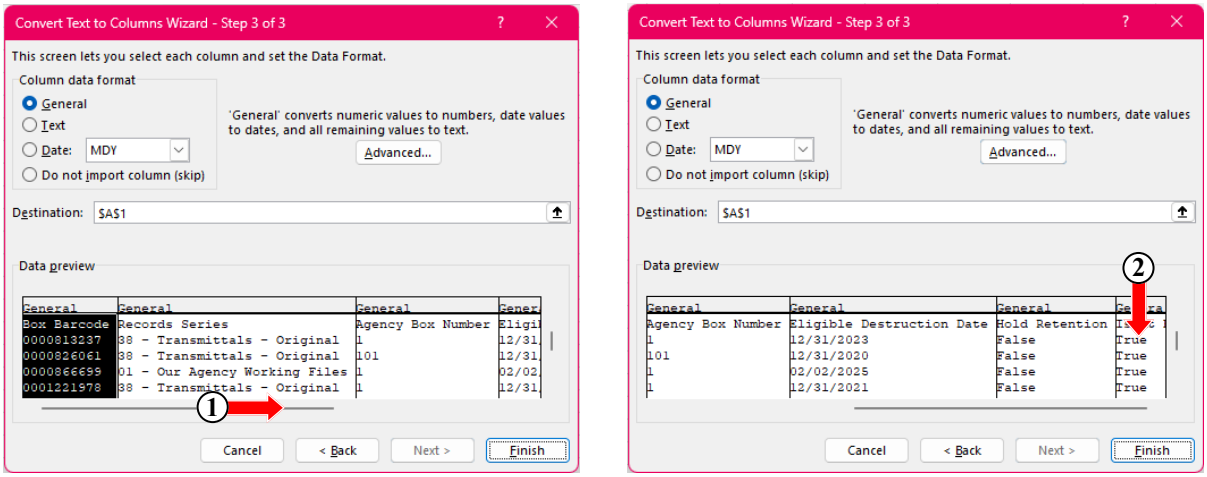
Step 1 of 3 dialogue box shows. Click once **(1)** on the radio button for **Delimited** then click once **(2)** on **Next >** .

Convert Text to Columns Wizard (continued)

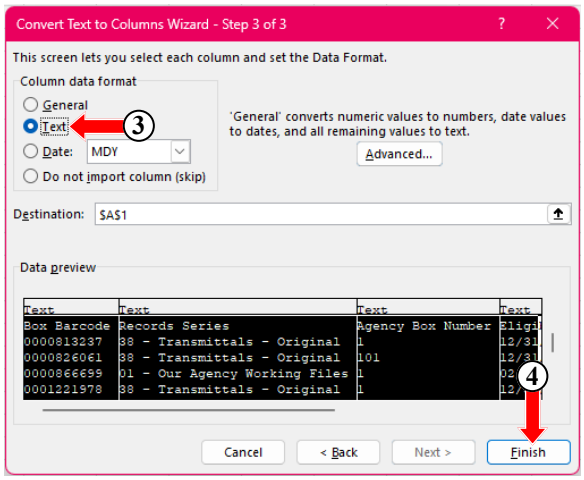


Step 2 of 3 dialogue box shows. In the **Delimiters** column, make sure the only checkbox **(1)** selected is for **Other** and place the Pipe symbol in the data field next to Other. To create the Pipe Symbol, hold down **SHIFT** and press the backslash key \ then click once **(2)** on **Next >** .

Convert Text to Columns Wizard (continued)

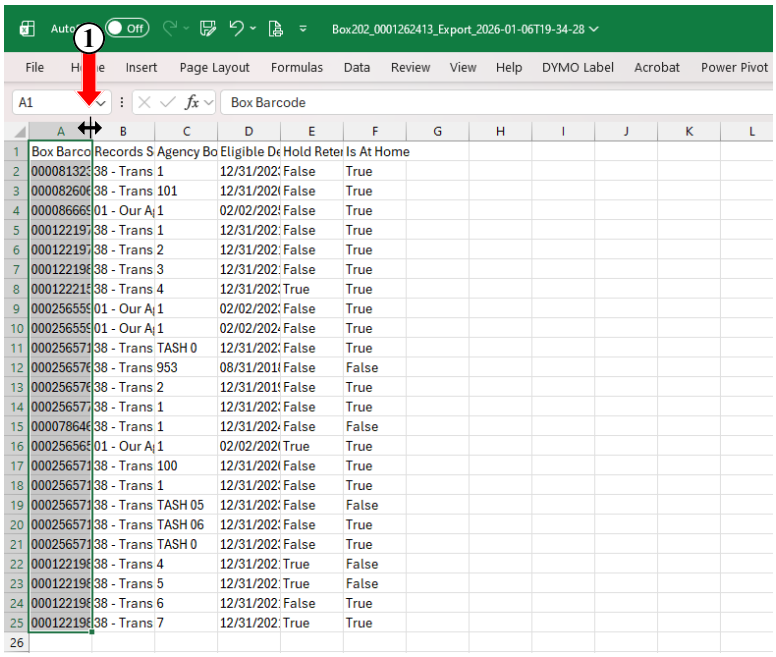


Step 3 of 3 dialogue box shows. The first column of text in **Data Preview** is automatically selected, move the scroll bar **(1)** to the right edge of the grid hold down the **SHIFT** key and click once **(2)** on the last column. All columns will be selected.

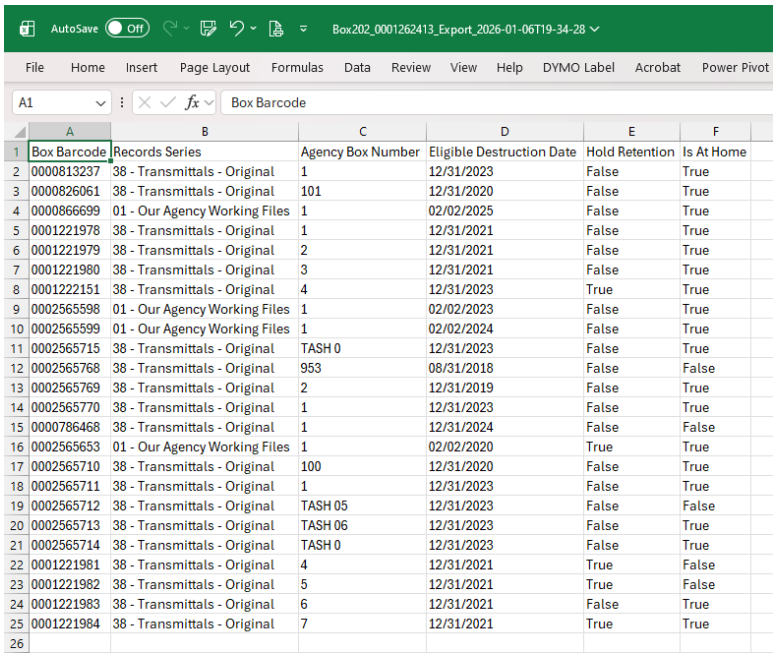


Step 3 of 3 (continued) All Data Preview cells are now selected. In the **Column data format** section, click once **(3)** on the radio button for **Text**. Then, click once **(4)** on **Finish**.

Format the worksheet columns



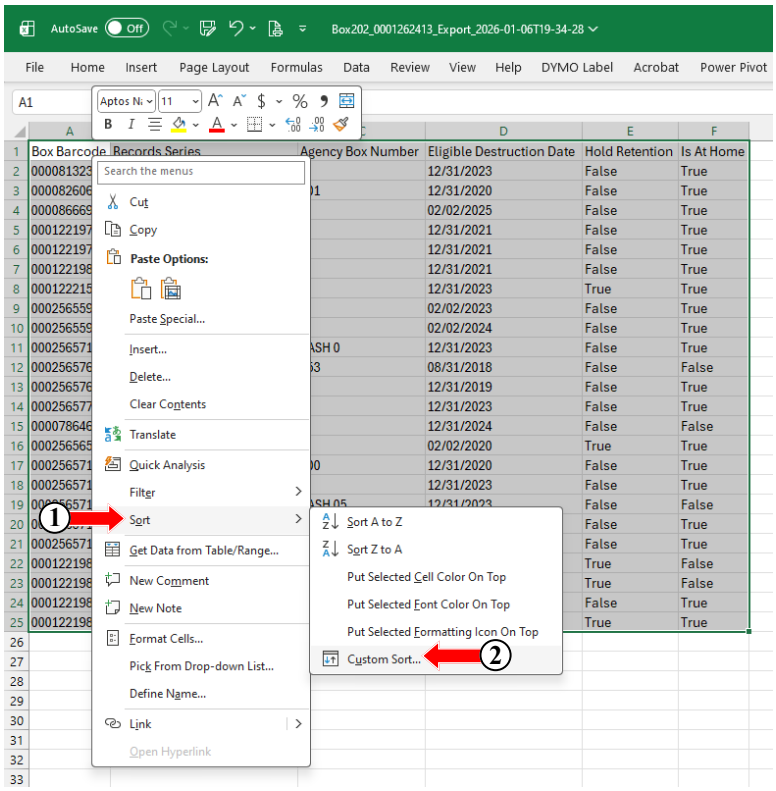
Click twice on **(1)** the vertical line between column A and column B in the Column Heading section (a cross symbol with arrows pointing left and right will show). This will expand the width of the column A to the longest field. Do this for the other columns (B, C, D, E, and F), as well, so all of the information is able to be seen.



Box Barcode	Records Series	Agency Box Number	Eligible Destruction Date	Hold Retention	Is At Home
0000813237	38 - Transmittals - Original	1	12/31/2023	False	True
0000826061	38 - Transmittals - Original	101	12/31/2020	False	True
0000866699	01 - Our Agency Working Files	1	02/02/2025	False	True
0001221978	38 - Transmittals - Original	1	12/31/2021	False	True
0001221979	38 - Transmittals - Original	2	12/31/2021	False	True
0001221980	38 - Transmittals - Original	3	12/31/2021	False	True
0001222151	38 - Transmittals - Original	4	12/31/2023	True	True
0002565598	01 - Our Agency Working Files	1	02/02/2023	False	True
0002565599	01 - Our Agency Working Files	1	02/02/2024	False	True
0002565715	38 - Transmittals - Original	TASH 0	12/31/2023	False	True
0002565768	38 - Transmittals - Original	953	08/31/2018	False	False
0002565769	38 - Transmittals - Original	2	12/31/2019	False	True
0002565770	38 - Transmittals - Original	1	12/31/2023	False	True
0000786468	38 - Transmittals - Original	1	12/31/2024	False	False
0002565653	01 - Our Agency Working Files	1	02/02/2020	True	True
0002565710	38 - Transmittals - Original	100	12/31/2020	False	True
0002565711	38 - Transmittals - Original	1	12/31/2023	False	True
0002565712	38 - Transmittals - Original	TASH 05	12/31/2023	False	False
0002565713	38 - Transmittals - Original	TASH 06	12/31/2023	False	True
0002565714	38 - Transmittals - Original	TASH 0	12/31/2023	False	True
0001221981	38 - Transmittals - Original	4	12/31/2021	True	False
0001221982	38 - Transmittals - Original	5	12/31/2021	True	False
0001221983	38 - Transmittals - Original	6	12/31/2021	False	True
0001221984	38 - Transmittals - Original	7	12/31/2021	True	True

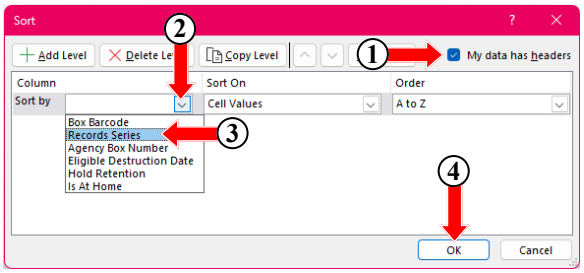
This is how the worksheet looks when formatted into columns.

Worksheet is formatted into columns, sort data



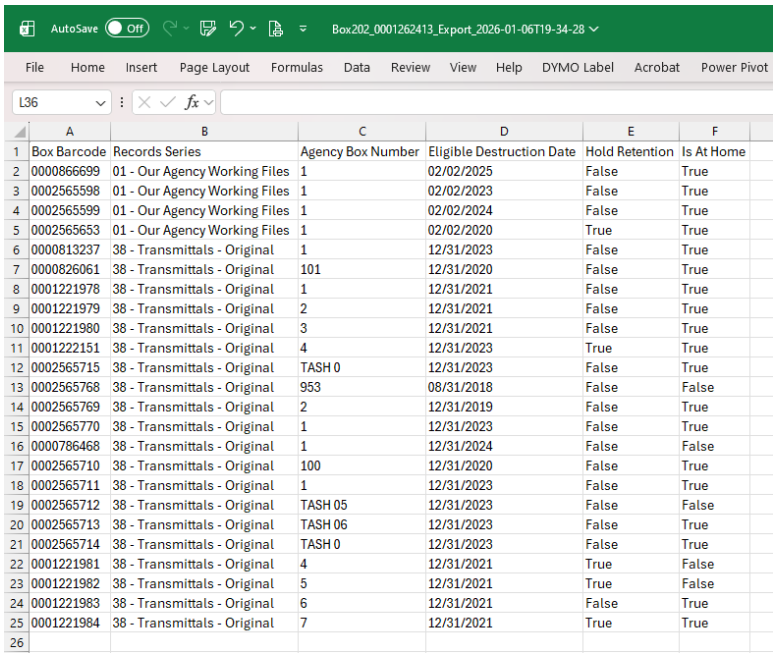
With the first column of text still selected, the information needs to be sorted by the **Records Series** column. On the keyboard, hold down **CTRL** and press **A** to select all cells of text. Right click the mouse over the selected text. A menu will appear, move the mouse down the list **(1)** to **Sort**. Do not click on Sort, a menu will show to the right. Move down the list and click once **(2)** on **Custom Sort**.

Sort popup screen



The **Sort** dialogue box will display. Click the checkbox **(1)** for **My data has headers**. Next, click the dropdown **(2)** for **Sort by** then click once **(3)** on **Records Series** and click once **(4)** on **OK**.

Worksheet is complete

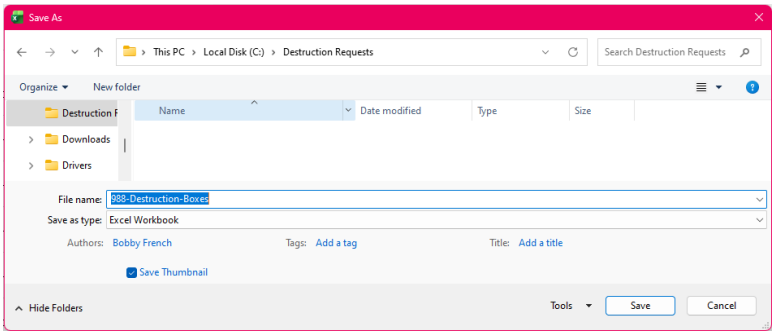


	A	B	C	D	E	F
1	Box Barcode	Records Series	Agency Box Number	Eligible Destruction Date	Hold Retention	Is At Home
2	0000866699	01 - Our Agency Working Files	1	02/02/2025	False	True
3	0002565598	01 - Our Agency Working Files	1	02/02/2023	False	True
4	0002565599	01 - Our Agency Working Files	1	02/02/2024	False	True
5	0002565653	01 - Our Agency Working Files	1	02/02/2020	True	True
6	0000813237	38 - Transmittals - Original	1	12/31/2023	False	True
7	0000826061	38 - Transmittals - Original	101	12/31/2020	False	True
8	0001221978	38 - Transmittals - Original	1	12/31/2021	False	True
9	0001221979	38 - Transmittals - Original	2	12/31/2021	False	True
10	0001221980	38 - Transmittals - Original	3	12/31/2021	False	True
11	0001222151	38 - Transmittals - Original	4	12/31/2023	True	True
12	0002565715	38 - Transmittals - Original	TASH 0	12/31/2023	False	True
13	0002565768	38 - Transmittals - Original	953	08/31/2018	False	False
14	0002565769	38 - Transmittals - Original	2	12/31/2019	False	True
15	0002565770	38 - Transmittals - Original	1	12/31/2023	False	True
16	0000786468	38 - Transmittals - Original	1	12/31/2024	False	False
17	0002565710	38 - Transmittals - Original	100	12/31/2020	False	True
18	0002565711	38 - Transmittals - Original	1	12/31/2023	False	True
19	0002565712	38 - Transmittals - Original	TASH 05	12/31/2023	False	False
20	0002565713	38 - Transmittals - Original	TASH 06	12/31/2023	False	True
21	0002565714	38 - Transmittals - Original	TASH 0	12/31/2023	False	True
22	0001221981	38 - Transmittals - Original	4	12/31/2021	True	False
23	0001221982	38 - Transmittals - Original	5	12/31/2021	True	False
24	0001221983	38 - Transmittals - Original	6	12/31/2021	False	True
25	0001221984	38 - Transmittals - Original	7	12/31/2021	True	True
26						

The **Hold Retention** column tells the SRC Inventory Coordinator which items will process through destruction (noted as **False**) and which items have been placed on hold and will not process through destruction (noted as **True**).

The **Is At Home** column tells the SRC Inventory Coordinator which items are at the SRC to process through destruction (noted as **True**) and which items are at the agency and cannot process through destruction (noted as **False**).

Save the worksheet to the device



Save the worksheet. Include the Agency Code in the **File name** field and select **Excel Workbook** for the **Save as Type** field.

Return to Page 321 and restart the process if a worksheet needs to be created for **Microforms**.

Submit the Destruction Request Email with Itemized Worksheet Attachments

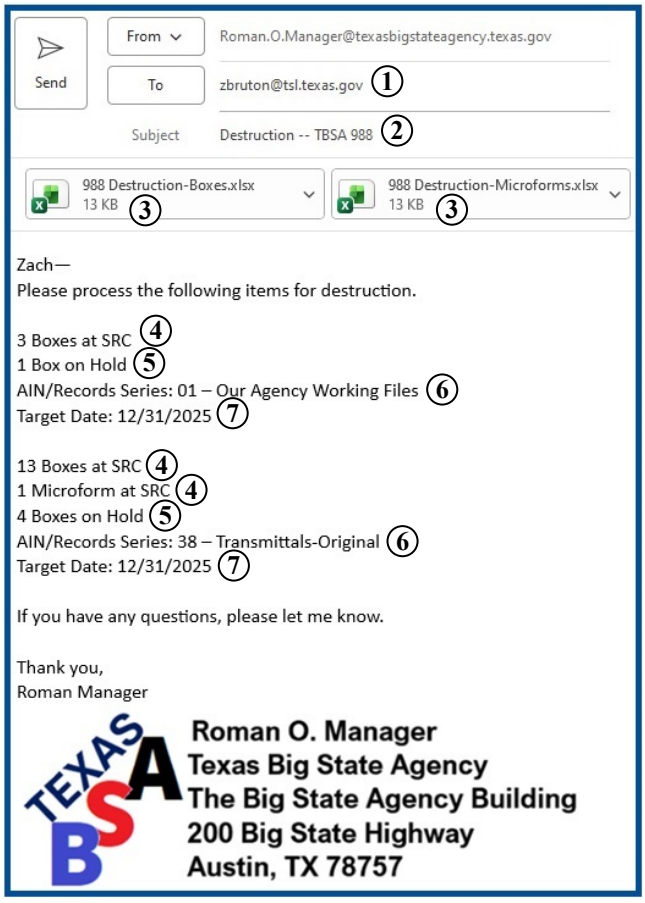
When it is time to let the SRC Manager know that there are items for destruction, use email to send the destruction request. This email can be sent by the Records Management Officer or the Records Management Liaison assigned to that role in Gimmal. No one else at the agency can send a destruction request. The email illustration is explained with number labels:

1. Address the email to the SRC Manager. As of publication revision date, the SRC Manager is Zach Bruton, email address: zbruton@tsl.texas.gov
2. Subject: Destruction Request (Destruction Request, Agency Acronym - Agency Code)
3. Attachment(s) for Destruction Worksheets (the optional second worksheet(s) generated from the last section of instructions; do not attach the first worksheet that was completed to detail the below information)

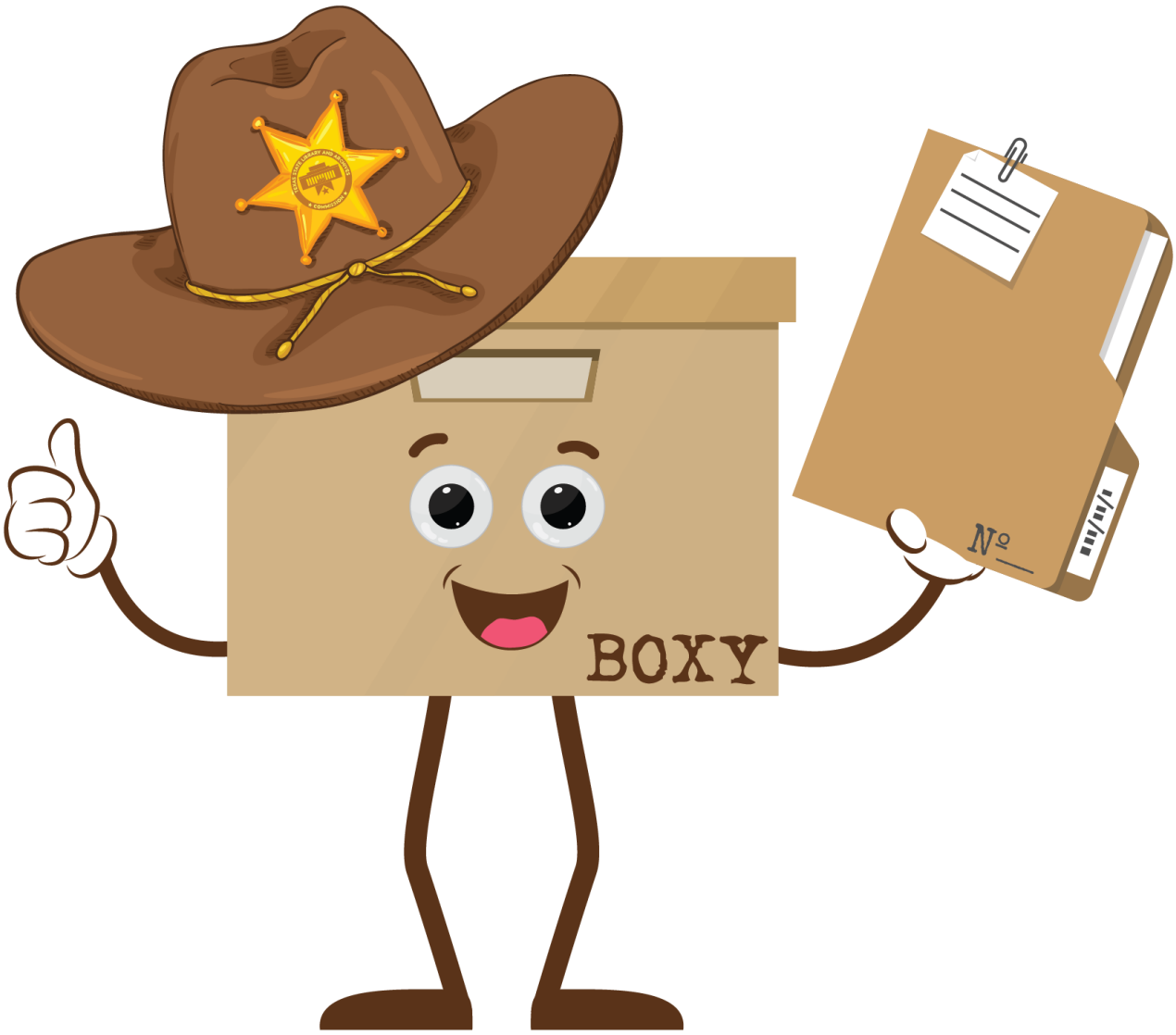
In the body of the email, use data from the worksheet to provide in this specific order:

4. Total number of accessioned boxes/microforms (be sure to separate those numbers by medium) not placed on hold to be processed through destruction for the Record Series (Agency Item Number (AIN) / Record Series Title). On the worksheet, this is the number from the Destruction column.
5. (If needed) Total number of boxes/microforms (be sure to separate those numbers by medium) placed on hold for the Record Series (AIN / Record Series Title). On the worksheet, this is the number from the Hold column.
6. Record Series (AIN / Record Series Title).
7. Target Date (all accessioned items for this AIN / Record Series Title until this date not on hold will be processed for destruction).

Repeat this process for each Record Series. Below is an illustration of a destruction request email for two Record Series (AIN 01 is for one medium type with hold information and AIN 38 is for two media types with hold information for boxes, but no hold information for microforms).



NOTES


BOXY
Nº