

RIMS/Gimmel User Guide

Revised December 2022



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RIMS/Gimmel is the online database the Records Management Unit of the Wyoming State Archives uses to keep track of the paper records that move in and out of the State Records Center. RIMS is an acronym for Records and Information Management System. Gimmel is the name of the software. For the purposes of this guide RIMS will be the term used for the database.

Problems Logging In?

RIMS will lock you out after three (3) unsuccessful login attempts. Please contact your analyst to confirm your username, unlock your account, and/or reset your password. Your assigned analyst can be found at <https://wyoarchives.wyo.gov/index.php/who-is-my-records-analyst> and contact information can be found at the end of this guide.

The program will force you to change your password after six (6) months. Contact your analyst if you have issues with the process.

No Available Seats Message

If you try to login and get a message that says that there are **no available seats**, please wait a while and try again. The system has a finite number of slots available for users, and you will see that message when they are all full.

Setting Preferences

Make sure your preferences are set before attempting any other actions. Setting them will connect you to your actions within the system. For example, if preferences are not set correctly, the software will not show newly created boxes or records/files in your possession and you will not be able to request pickup. You should only need to set your preferences once. If you are experiencing issues with not being able to see your boxes and files check your preference settings before moving forward with alternative trouble-shooting strategies.

1. Click on the **Dashboard** button located on the top line of buttons – sixth from the left on top row of buttons.
2. On the left hand side of the screen, click on **Preferences** which will open the **My User Preferences** screen.
3. Scroll down until you can see the **Records/Files** and **Boxes** sections.
4. Under the **Records** area, click the **Search** button next to the **Default Current Location**. This will open the **Set Item Location** page.

5. Click on the **Users** tab and use the search boxes to look for your first or last name.
6. Click on the radio button next to your name and make sure a number populates the box near the top of the screen next to where it says *Enter a destination barcode or select an item from the grid*. This number is the barcode associated with your profile. Your name should appear next to the barcode.
7. Click **OK**, which will take you back to the **Preferences** screen. You should see your barcode in the box next to **Default current location**.
8. Copy your barcode and paste it into the **Default request location** under **Records or Files**, as well as both default location boxes under the **Boxes** section.
9. Click **Save** and close the **Preferences** screen.

Be sure to **turn the popup blocker OFF** on your browser! You can't print labels with it on.

Setting up a Shortcut on your Desktop

You might find it useful to set up a shortcut on your desktop, especially if you use RIMS frequently or don't want the link buried.

1. Right click on a blank area of your desktop.
2. Hover over **New** and then click on **Shortcut**.
3. Type or copy <http://rims.wyo.gov/> into the space provided and then click **Next**.
4. Pick a name for the shortcut that makes sense to you, RIMS for example.
5. Click **Finish**.

Home Page

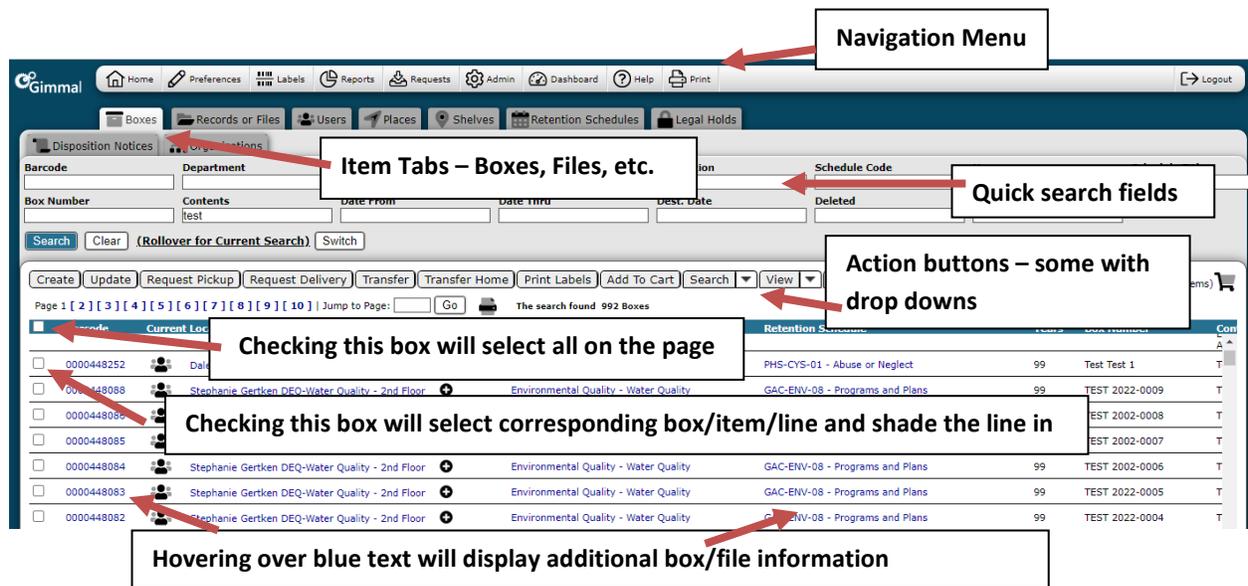
Navigation Menu – Provides access to the various indicated functions

Item Type Tabs – Used to search and view various items (Boxes, Records, etc.)

Quick Search Area – Used to enter search criteria for the various fields

Action Buttons – Executes specific actions - some through drop down menus: Request pickup, Transfer, New, etc.

Home Page Grid – Displays queried results in a list that can be sorted by any column



Please take some time to get to know the **Action Tool Bar buttons** and each of the respective drop-down menus:

Search	View
Detailed – can search any field located on the records or files page	Record – one of many ways to see all the information related to an entry
Keyword – search by specific words from a list of fields	Cart - can add items to cart and perform actions like request pickup and delivery.
Duplicate – search for duplicates from a list of fields and/or do a Boolean search (AND,OR,and NOT)	History – will show all actions associated with an entry – creation, printing labels, transferring etc.

Common Icons

	<p>This <u>Person</u> Icon indicates this box <u>or</u> record-file is located with an individual. The name and agency will be to the right of this icon.</p>
	<p>This <u>Shelf</u> Icon indicates this box is located at the State Records Center on the shelf location listed (e.g. 6846, AF/T-17, AB-089)</p>
	<p>This <u>Box</u> Icon indicates the location of a specific file. The number of the box can be seen to the right of the icon.</p>
	<p>This <u>Place</u> Icon indicates a location other than a shelf or person. The general user will not often see this as it is used by Records Management staff to designate boxes that have been deleted or moved to the Archives for permanent retention, for example. It also represents the State Records Center.</p>
<p><i>ITALICS</i> and Red Text</p>	<p>If an entry appears in italics and has red text that means that box or file has been deleted. Agency users should not be able to see these entries but Records Management staff can. If you can see these please let us know.</p>

Searching for items (boxes, records, etc.)

1. Click on item tab (**Boxes, Records**, etc.).
2. To find everything listed under your office enter your department or division information in the designated search box and hit enter. You don't have to fully spell it out. For example, type "fam" for Family Services.
3. To narrow down your search, enter the specific criteria in the quick search fields. Enter as much limiting information as you have. Use box numbers; box barcodes, dates from and thru, data from the contents, etc.
4. Click **Search** or press **Enter**.
5. To start over click the **Clear** button.

Searching TIPS:

To see your current search criteria hover over the words *Rollover for Current Search* -located under the quick search boxes.

Clicking on column headings sorts that column in ascending or descending order (e.g. box barcode number, date from, etc.)

Holding down CTRL and typing "F" opens up a search box that searches everything on the

current page. If you have more than one page of boxes or files to review you will need to use CTRL-F on each page. If anything matches your search criteria it will tell you how many instances it finds and the matches will be highlighted.

Another way to do an all text search is to click on the *Switch* button. Enter your information in the search box, and click **Search** or hit **Enter**. It will bring up all entries containing the search criteria.

Spelling matters but capitalization does not. If you misspell something, you will likely get zero search results.

You can search dates by using < (less than) or > (greater than). For example, type <1/2/2021 for results less than/dates before 1/2/2021.

If you want to search a field that should not contain information, use the term *isnull* (all one word). If you think a field should contain information, use the term *isnotnull* (all one word).

If you ever get search results for an office other than your own, please contact your analyst.

Printing or Copying Search Results

1. Pull up and sort your results, and click on the printer icon on the page. This will produce a static report that looks like the search results page. It cannot be manipulated. Click on **Send to Printer**, which is located at the top center of the page under the search criteria.

OR

2. Copy and paste the results into a spreadsheet. This allows for more flexibility to manipulate the data.

Creating a New Box

Important! RIMS will NOT let you enter records under a PERMANENT record schedule. Contact your analyst for more information on what to do with permanent records.

1. You will need to enter a new box number and update all data for each new box. (If you've made mistakes, your box(es) can be updated at any time.)

***Tip:** When filling out the data entry form do NOT hit enter to move to the next field. If you hit Enter, the system will create the box – i.e. bring up the screen that says a box has been successfully created. You will need to close that little screen and then select the box and click on update. From there you can finish filling out the data entry form.*

2. Make sure you are on the **Boxes** tab and click on **Create** (takes you to **Create Box** screen)
3. For an Organization search for your department, division, section, or subsection enter the information into the search box(es) and click on **Search** or hit **Enter**.
4. Click the radio button on the left side of the correct entry for your office. There might be more than one page of search results, so make sure to review the detailed results to select the correct one and make sure that the information populates in the gray line next to the word Organization upon selection.
5. Search for the appropriate retention schedule using the search boxes. The schedule code will often be used (ADM-GMT-32 for example). It is helpful to identify the code(s) you will be using before you start. If you need help identifying the correct schedule please contact your analyst.
6. Click on the radio button to the left of the schedule you want and make sure the information populates in the gray bar next to the words Retention Schedule.
7. Enter Box Number
Tip: Create a Unique Box Number to fit your requirements – Up to 50 characters or spaces per box number: Examples: 2011-01 or 2011-01A or 2011-Adm-01, etc.
8. Enter box contents – 4000 character limit. The first couple of lines of the contents will be show up on the barcode label
9. Enter Dates 'From' and 'Thru' with the following format: dd/mm/yyyy.
Tip: to the right of the date box is a calendar icon which allows you click on the date desired.
10. **Fill in the Cut-off date.** This is the date that triggers the retention schedule. The Cut-off date varies depending on the applicable retention schedule and corresponding event code. If you need help figuring out the cut-off date, please contact your analyst. NOTE: Often the cut-off date is the same as the date thru.
11. To create just the one box, click Save and Close. The program will give you a message saying a barcode has been successfully created. Click OK and it will take you back to the home page grid.
12. If you want to create more than one box in a series, especially if they all have the same retention schedule, click the blue button Save and New. This will bring up a new data entry page, which will carry over the organization and retention schedule information.

Note: Rolled plans (construction drawings, maps, etc.) are tracked like boxes. (Plan # = Box #) If you are entering rolled plans, please be sure to click the Rolled Plan checkbox located underneath Date Thru.

Note: New Box labels are automatically generated by Gimmel and sent to the Label Queue. See Printing Box Labels for this step.

Creating a New Record or File

1. Make sure you are on the **Records or Files** tab and then click **Create**. This will open a **Create Records or Files** data entry screen.
2. Complete Record/File information including organization, retention code, title, and any other fields that are appropriate. See box creation instructions for details on how to find the organization and retention schedule information.
3. Click **Save & Close** button to return to the home page grid. Need to create more than one file in a series? Click the **Save & New** button to repeat the process. Then click on **Home**.
4. To transfer new records or files to a box:
 - a. Select files under **Records or Files** tab.
 - b. Click on **Transfer** which will open the **Transfer Items** page.
5. Make sure you are in the **Boxes** tab. Enter the barcode in the **Box Bar Code** search field.
 - a. Click on **Search** or hit **Enter** and box will appear below. Verify it is the correct box, and then click on the radio button at the left of the box information. Make sure the box barcode information populates the box underneath the words *Items will be transferred to this location*.
 - b. Press the blue **Transfer** button in the upper right hand corner.

Updating Boxes or Files

1. Click the item type tab (**Boxes or Records or Files**).
2. Find and check the item to be updated.
3. Click on **Update** button which will bring up the data entry page for that entry.
4. Make changes and click the blue **Update** button in the upper right hand corner of the screen.

OR

5. Click on the barcode of the box or file.
6. Click on the gray **Update** button (2nd from left in top row), which will bring up the data entry page.
7. Make the changes and click the blue **Update** button in the upper right hand corner of the screen.

Printing Box Labels

First things first - Turn the popup blocker off on your browser! If the popup blocker is on, you will not be able to see and print the labels.

Check that your printer settings are set to “actual size.” Do NOT make any other print size adjustments.

Use Avery Labels 5168 or equivalent

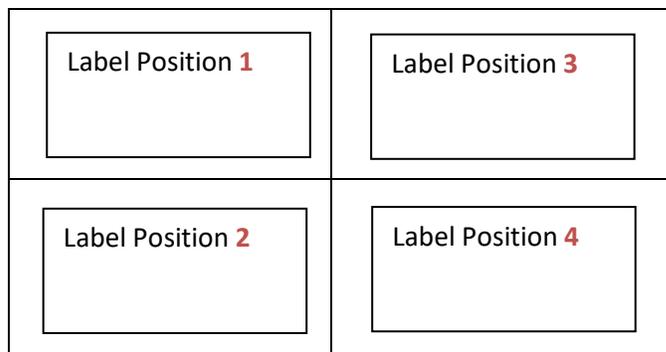
(Do NOT make paper labels and tape them to box.)

Option 1: Manage Label Queue from the Navigation bar

1. Click on **Labels** – top row third from left
2. Select **Box Avery 5168 Queue**. The boxes in the queue will show next to name of the queue, (10) for example.
3. The first four (4) labels in the queue can be seen at the bottom of the page. Additional labels can be seen by clicking on the pages listed. Select everything you want to make labels for, and click on **Print Selected**. A popup showing the labels should appear.
4. Click on the printer icon in the upper right hand corner.
5. The popup screen should disappear, and open **Delete Printed Labels From Queue** page. Choose **Delete** or **Return**, and you will be returned to the **Manage Label Queues** page.

Option 2: from the Home page

1. Select the boxes for which you're making labels.
2. Click on **Print Labels** action button (7th from left).
3. On the **Print Labels-Choose Design** screen, make sure the design you wish to print says Box Avery5168. (The other option on the dropdown is a rolled plans coversheet which should be printed on paper and only used with rolled plans.)
4. Choose the starting position for labels – see diagram below – and hit print.



5. An Adobe Reader popup showing the first page of labels should appear. If you have more than one page to print, it will tell you how many at the top of the page, 1/5 for example. Click on the printer icon in the upper right hand corner, and follow the rest of the steps for your printer.
6. Once the labels have printed, close the Adobe Reader preview window, which will take you back to the **Print Label** screen. Close this screen to take you back to the Home page.

Printing Rolled Plan labels

Rolled plan labels should be printed on an 8 ½" x 11" piece of paper, preferably red. There will be one label per page.

Select the plans you want to make labels for and click on **Print Labels**. This will open the **Print Labels – Choose Design** page. Use the drop down menu to choose **Rolled Plan Coversheet** (instead of BoxAvery5168). Click **Print**, which will open the print preview, click on the printer icon, and proceed from there.

Printing record/file labels – optional

Use Avery 5160 label stock

If you need to print file labels, the directions are similar to box labels (see previous section). You can get to them from the **Labels** tab or **Print Labels** tab under the **Records or Files** tab. Make sure you choose the **Record/File Avery 5160 Queue** or **Design**.

Rush/Emergency Requests

If you need a rush delivery - **First**, enter the request in RIMS. Put the words *Emergency Request* in the **Comment Box** on the **Request Items** screen. **Second**, call Ed Griego (307-214-1901) or Beth Miller (307-637-4887) at the State Records Center, and/or your records analyst. Call until you talk to a live person. This will ensure that we can fulfill your request as quickly as possible.

Requesting Delivery of Boxes from the State Records Center

Boxes are normally delivered to you on the same or next work day. If it has been longer than two days, please call Ed or your records analyst!

1. Click on the **Box** item tab. Locate the box(es) on the home page grid.
2. Click the check box (far left column) next to selected boxes (the little box will turn blue with a check mark and the row is highlighted in gray). Please Do NOT request more than 15 boxes at a time. If you need more than 15 boxes please contact Ed Griego – edward.griego@wyo.gov or 307 214-1901 - to work out a timeframe for delivery.
3. Click on **Request Delivery**.

4. Boxes you select will be listed at the top of the **Request Items** page. Verify your barcode number is located in the box next to where it says *Items will be requested to this location*. Your name and location should show above this box. If that box is not filled in enter your first or last name under the **Users** tab and hit enter or click on Search. Click on the radio button next to your name and make sure the information populates the above mentioned box.
5. Enter comments if necessary. If you want a box delivered to a location other than your office you can enter that information here, for example.
6. Click on the blue **Request** button in the upper right hand screen corner and wait for on-screen confirmation.

Requesting Delivery of Records or Files that are listed in RIMS

If you suspect a file you need already exists in RIMS, please search for it on the Records or Files tab. If you find the file, do the following:

1. Choose the file by clicking on the small box to the left of the entry. This will put a check in the box and turn the line gray.
2. Click on the gray **Request Delivery** Button, which will open the **Request Items** page.
3. Make sure your name and barcode populate the *Items will be requested to this location* box. If not, search for your name under the **Users** tab and choose your entry by clicking on the radio button next to your name. Your information should populate the above mentioned box.
4. If necessary, type any notes in the comments box and click on the blue Request button in the upper right hand corner of the page.

OR

If you think you know which box the file should be in:

1. Find the box and click on the box barcode. This will open the **View Box** page.
2. Scroll down towards the middle of the page until you see the gray file icon. If there are files in the box the number of files will appear to the right of the file icon.
3. If there are files, click on the link that says **Query Records of Files within this Box**. This will take you to the records/files tab and show you all the entries.
4. If the file you want is on the list, follow steps 1-4 listed above.

Requesting Delivery of a File that does NOT already exist in RIMS

If the file you want does NOT already exist in RIMS you will need to create it and then request it:

1. Search for the box where you think the file is located.
2. Click on the box barcode. This will take you to the **View Box** page.
3. Scroll down to the middle of the **View Box** page until you see the file folder icon.
4. To the right of the file icon is the word **Create**-click here. This will take you to the **Create Records or Files** page.
5. Fill out the name/title field and any additional fields as needed. Remember, you may need to find and request this file at a later date so add enough information for you to do so. For many of you, filling out the title field will be sufficient.
6. Confirm the information you entered is correct then click on the **Save and View** button in the upper right hand corner. This will take you back to the **View** page.

*If you are creating multiple files that are located in the same box, click on the blue Save and New button and repeat steps 5 and 6.

7. From the **View** page, click on **Request Delivery** button, make sure your name and barcode is filled in under the Items will be requested to this location field, then click on the blue **Request** button in the upper right hand corner.

Requesting Pickup/Returning Boxes or Files to the State Records Center

If you want to send us more than 15 boxes at a time please coordinate with Ed Griego – edward.griego@wyo.gov or 307 214-1901 - to work out a timeframe for pickup.

1. Locate boxes (or records/files) under appropriate tab. If the items are on multiple pages, sort the current location column to group the items together.
2. Click the checkbox for each item to be transferred.
3. Click on **Request Pickup** button which will open the **Request Items to be refiled** screen.
4. Make sure your barcode, or the barcode of the person where the item is located, is in the box underneath the list of items to be refiled.
5. Click on the blue **Request Pickup** button in the upper right hand corner of the screen to submit your pickup request.

TIPS and REMINDERS

- **Permanent records CANNOT be entered in Gimmel/RIMS. Contact you analyst to deal with permanent records.**
- **Turn popup blocker off on your browser! You can't print labels with it on.**
- Labels: Box labels are Avery Labels 5168 or equivalent; File labels are Avery 5160.
- Has your location or contact person changed? Update your information under the User tab or call your records analyst to help you with this.
- Holding down CTRL (control) and typing "F" opens up a search box that will search all words on a page.
- Is this a RUSH? Enter Rush items first in RIMS. Also, enter "Emergency Request" in the Comment Box on the Request Items screen. Please also call Ed Griego (307-214-1901) at the State Records Center, and/or your records analyst.
- Boxes are normally delivered to you the same or next work day. If it has been longer than a few days, please call your records analyst!
- Please limit delivery and pickup requests to 15 boxes or fewer. Work with Ed if you are dealing with more than 15.

Contacts

Pickups and Deliveries – Ed Griego – edward.griego@wyo.gov – (307) 214-1901

To find the analyst assigned to your agency please visit our website at <https://wyoarchives.wyo.gov/index.php/who-is-my-records-analyst>

Records Analyst – Stephanie Gertken – stephanie.gertken@wyo.gov – (307) 777-8907

Records Analyst – Beth Miller – beth.miller1@wyo.gov – (307) 637-4887

Records Analyst – Dale Wedel – dale.wedel@wyo.gov – (307) 777-8628

Supervisor Records Management Unit and State Imaging Center – Carmen Clayton – carmen.clayton@wyo.gov – (307) 777-5586

Wyoming State Archivist – Sara Davis – sara.davis@wyo.gov – (307) 777- 8691