



HISTORY FACTORY AMS

Quick Start Guide

Welcome to AMS: History Factory's Archival Management System

AMS is a controlled-access repository for the documents, files and records which tell your company's history. It stores the deep data that professional archivists rely on, while making all items with that data easy enough for anyone with the proper permission to explore.

With this platform, you can search, securely share, scroll through, and even watch (should you have archived videos) items in your archives. You also can bring in new items without a fuss, whether that's a digital file to upload or the location documentation for a physical file. If you're preparing for a project, you can build a vision board. If you're posting to social media, you can instantly size an image for your platform of choice.

Because AMS is designed to take complications out of tapping into your archives, using it requires little training.

This Quick Start Guide gives you details for getting into the system and then highlights ways to use the system. For full instructions on each highlight, please see the respective page number(s) to reference in the [AMS User Guide](#).

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How to Register an Account for AMS Access

To gain access to AMS, a History Factory archivist must first invite you. For that invitation, please reach out to either your History Factory archivist team or to your company archives manager.

1. Once you've been approved for AMS access, you should receive an email from pleasereply@em.brandfolder.com with the subject "I've granted you access to the AMS Demo Instance Brandfolder!"
2. Click the "Accept invitation" button to start the registration process by entering your name, email address and a password.

Note: Here and within AMS, you will see "Brandfolder" – the name of an enterprise-grade digital asset management (DAM) service with which AMS has married a standards-based collections management system (CMS). For your ease, the processing is all in one system.

3. Sign in to AMS:

To sign in as a Single Sign-On (SSO) user, click your organization's SSO button to be brought to your organization's sign-in page. Once signed in, you will be brought to your AMS portal.

To sign in as a non-SSO user, click "or sign in with your Brandfolder account." Enter your AMS email address and password and click "Sign in." Once signed in, you will be brought to your AMS portal.

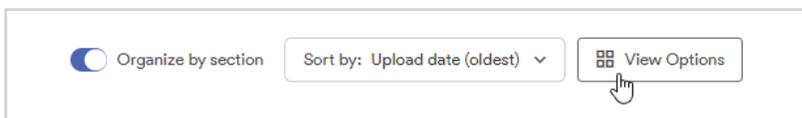
See Pages 3-4 of the [AMS User Guide](#) for full instructions.

Required Setup – Adjusting Your AMS View

Once you are signed in to AMS, you will want to adjust your "View Options" to include the title of each archived material. By default, AMS will only display the ID number for the archived material; by adjusting the view, you will be able to see the title field for each item.

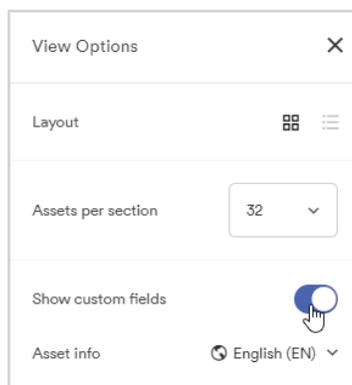
To adjust the view to include the Title field:

1. Click on the **View Options** button, below the search bar:



2. Click the toggle next to **Show custom fields**. Once you click it, the toggle will turn blue to signify that it is enabled:
3. The setting is now enabled, and you can **close the View Options** window.

Depending on the number of archived materials, the view should adjust momentarily. On larger collections with over 6,000 digital materials, this setting may take up to 30 minutes.



See Pages 6-13 of the [AMS User Guide](#) for full instructions. Look under: *Sorting, Asset Modal View, Overview Tab, Metadata Tab, Similar Tab, Embed Tab and Workflow Tab.*

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How AMS Organizes Your Archives

To begin drilling down to a specific category of items, it helps to understand the different ways AMS organizes your archives.



Sections (red arrow) are customizable categories to which each archived item belongs. There are three main Sections: **Digital Records**, **Physical Records**, and **Pending Records** (entries uploaded by you or another user but which have yet to be checked into the system and cataloged by an archivist).

Pins (purple arrow) are saved search queries created by a History Factory archivist or your corporate archivist. Pins are global, intended to make frequently sought items faster to find.

Labels (green arrow) show the hierarchy of classifications in the entire collection.

Collections (yellow arrow) are groupings that History Factory has made according to permission. Items in the General collection are viewable by the entire company. Items in the Restricted collection are viewable only by company members granted access to their sensitive content.

See Page 5 of the [AMS User Guide](#) for full instructions. Look under: *Overview*.

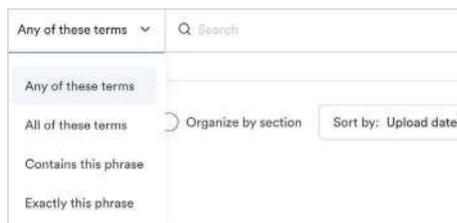
How to Narrow Your Search

AMS is designed to help you find items in a way that makes sense. The system lets you see internal search functions so that on your way to finding the item you need, you also gain an understanding of your organization's classifications.

Searches go through all the fields in the platform, including text captured from within such items as Word documents, PDFs, PowerPoint presentations, and any image file that passed through optical character recognition.

Four options help narrow your search:

- **Any of these terms** will return records that match *any part* of the search query.
- **All of these terms** will return records that include *all parts* of the search query, though *not necessarily in the same order*.
- **Contains this phrase** will return records that include *all parts* of the search query *in the same order*.
- **Exactly this phrase** will return only records that *exactly match* the search query. This is not recommended.



See Page 16 of the [AMS User Guide](#) for full instructions on using these options. Look under: *Search Bar*

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How to Filter Your Search

AMS is fully indexed, making it easy to find the exact asset you need. Each asset's name, description, metadata, and many other details are instantly full-text searchable. **Searchable details include:**

- **Name**
- **Title**
- **Creator**
- **Description**
- **Year Start**
- **Year End**
- **Provenance**
- **Location**
- **filenames**
- **extensions**
- **tags**
- **labels**
- **section name**
- **asset type**
- **metadata**
- **has comments / does not have comments**
- **approved/unapproved/**
- **expired**
- **custom fields**
- **email**
- **created at**
- **updated at**
- **published at**
- **expired at**
- **width & height**

For definitions of these terms and in-depth instructions for searching, see Pages 17-19 of the [AMS User Guide](#). Look under: *Search Filtering*

How to Share an Archived Item

You can share archived items directly with others on your system. AMS will generate the links for sharing. If your company's policies permit wider sharing, you can even share archived items with the public.

Here's how to get and customize a Share Link:

1. Select the items that you want to share.
2. In the Bulk Actions toolbar that appears, select the "Share" button.
3. In the pop-up window, a Public Share Link window will appear to allow you to set your sharing preferences:
 - **Share Link Name:** This is the title that will appear for users clicking the Shared Link.
 - **Share Link URL:** You can press the "Copy" button, which will automatically copy the link to your clipboard.
 - **More Options:** You can further customize the link – with such options as:
 - Make link private
 - Require email address to access
 - Disable download functionality (View Only mode)
 - Expire link
 - Notify me of updates to Share Link

See Page 15 in the [AMS User Guide](#) for full instructions.

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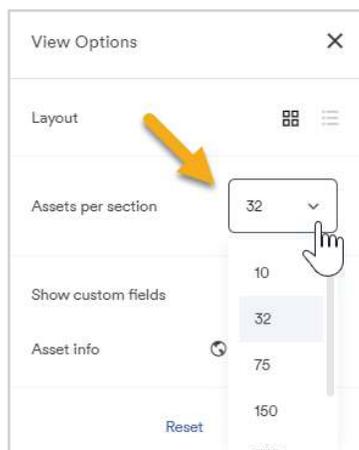
Scrolling Through Multiple Items

As you scroll through AMS, the currently viewable Section and Pages (if applicable) will stick to the top of your window. Within each Section, AMS will automatically create a new page when your asset volume exceeds 32.

Pagination helps speed up load times of large-scale archives, so that you can quickly view an item. You can adjust the number of assets per page. Your options are 10, 32, 75, 150, 300 and 1000.

Although individual and bulk downloads are possible, they aren't necessary to see this array.

See Page 7 in the [AMS User Guide](#). Look under: *Assets Per Section and Pagination*



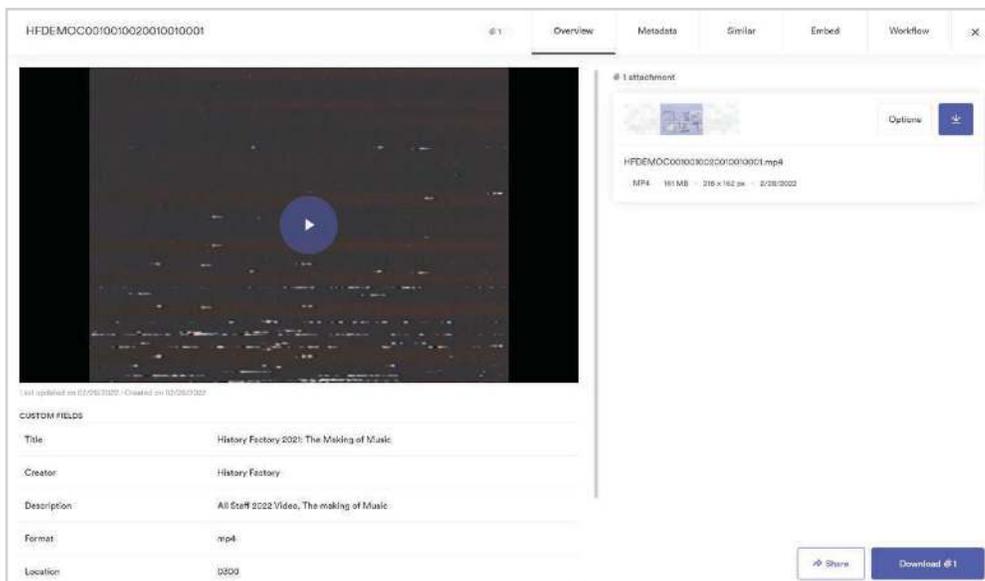
Watching a Video Without Downloading It

When you open an archived item, the first item you will notice within the Asset Modal view is a preview of the digital item. Depending on the item you open, you will see different options:

- **For image files and documents**, you will see a preview of the item. You'll also see a link to open the digital file in a new tab ("Open in new tab").
- **For video files**, you will see a frame of the uploaded video with a "Play" button. Pressing this button will play the video in your browser.

Again, there's no need for a download. This is all done in AMS.

See Page 8 in the [AMS User Guide](#) for full instructions. Look under: *Overview Tab*



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Building a Vision Board

The Personal Boards feature in AMS lets you create a curated view of archived items specific to your needs. Neither History Factory archivists nor administrators can see your Personal Boards.

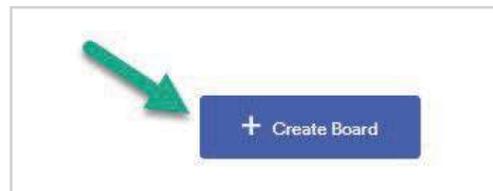
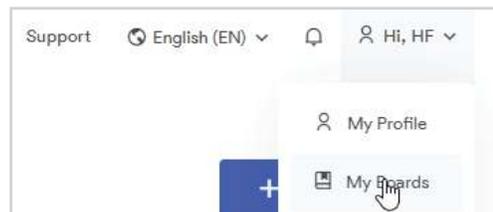
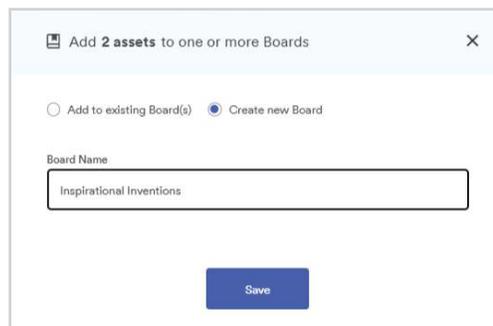
So whether you save items for later reference, or collect archived items for motivation or inspiration when preparing for a project, Personal Boards can only be viewed by you.

If you need a vision board, here's how to build it:

- To add an asset to a Board, start by selecting an archived item(s) and clicking “Add to Boards” in the Bulk Actions bar.



- From there, you will have the option to add the item(s) to a new Board or to an existing Board. In the example below, the two selected archived items will be added to a new Personal Board labeled “Inspirational Inventions.”
- Your assets will populate in the My Boards section, which can be accessed by clicking your username on the top right, and selecting “My Boards.”
- A new Board can also be created without adding assets by clicking “+ Create Board,” within the My Boards page.



Note: You can't share Boards with other users; they are only for personal use. See Page 14 in the [AMS User Guide](#).

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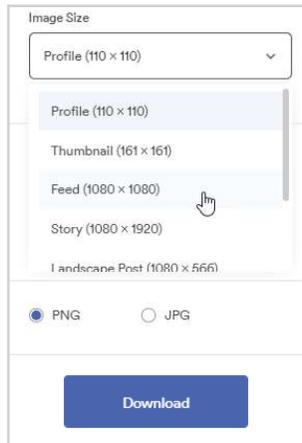
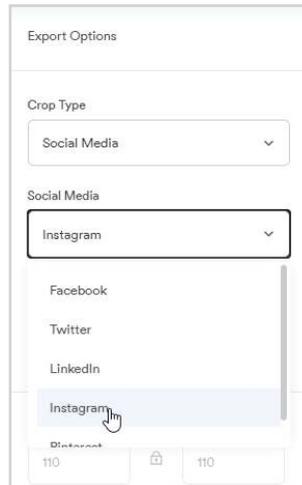
How to Download Post-Ready Images for Social Media

AMS comes with preloaded templates for the image specifications of social media platforms. This means that if you're getting ready to post to Instagram, Facebook, Twitter, LinkedIn, or Pinterest, you can download the version of an archived image custom to that platform.

Here's how to get the post-ready image:

1. Click on the image that you wish to crop and download.
2. Within the Asset Modal pop-up, click "Options."
3. Within the "Download Options" pop-up, click on "Export Options."
4. A window will appear with the asset and the Export Options features. You will now be able to adjust the cropping of the image using the Freeform selection box.
5. To use one of the built-in templates instead, click on the "Crop Type" drop-down box, and select the template you wish to use. For social media templates, select "Social Media."
 - If you select "Social Media," a new drop-down box labeled "Social Media" will appear. Select the platform you will be posting to. In this example, we will be posting to Instagram.
 - Under the drop-down box "Image Size," select the template for the various publishing sizes available for the social media platform you specified. In the case of an Instagram feed post, we will select "Feed (1080 x 1080)"
 - Once you have selected an image size, the Freeform selection box will update to match the image size constraints for that social media platform. Adjust the Freeform box by click-dragging to show the area you wish to crop.
 - When you have the crop you like, click "Download" to download the cropped image to the device you're working on.

Note: This cropping or resizing won't change the image already preserved in AMS. It will only affect the version you're downloading to your device. You also can shorten or reformat videos archived in AMS. See Pages 10-13 in the [AMS User Guide](#) for full instructions. Look under: *Download and Share*.



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How to Upload a Digital Item for Archiving

To upload a new digital item for addition to AMS, follow the steps below:

1. Click the “Upload File” button within the main header area.
2. When you click “Upload File,” a new window will appear labeled “Upload files to [Your Organization’s AMS Instance].” Enter your email address in the “Email Address” field, along with a message about the item you want to upload. In the example below, the user `testuser@amsdemo.com` is uploading a diagram through the “Upload file” link.
3. Click “Select Files for Upload” after you have entered your email address and a description of the item. This will cause a new upload section to appear. Simply **drag and drop the file you wish to upload**, or click the box to open a file explorer window within your device to manually select the file to upload.



 A screenshot of a web form titled 'Upload files to AMS Demo - History Factory Archives'. The form has a sub-header 'Upload an item to the AMS Demo Instance.' and contains two input fields: 'Enter your email address*' with the value 'testuser@amsdemo.com' and 'Message (optional)' with the text 'This is an old architecture diagram for our original office location.'. A blue button labeled 'Select files for upload' is positioned at the bottom center of the form.

 A screenshot of the same web form, but the 'Message' field is now empty. Below the message field is a large dashed-line box containing a plus sign and the text 'Drag file(s) here or click to browse'.

Note: After you have selected the file, it will automatically queue up to the system. But the file will not be visible immediately within AMS until an archivist has completed cataloging the item to your company’s collection. To check on the status of your upload, please contact amshelp@historyfactory.com.

How to Submit a Request to Archive a Physical Item

To submit a new physical item or collection to be archived into History Factory AMS, please reach out to the designated archivist for your company. Or, you can simply email amshelp@historyfactory.com referring to the physical item or collection that you would like to be archived, along with a description of the material. A History Factory archivist will be pleased to contact you to discuss your submission inquiry.

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