



HISTORY FACTORY AMS

User Guide

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What AMS Does

History Factory's AMS (Archival Management System) is an all-in-one inventory and access platform that supports professional curation of files and records, the creation of metadata to track these assets, and preservation workflows so that these assets can also be viewed and retrieved by users who are not archivists.

In addition to providing a secure repository for historical assets and the essential data about them, AMS offers access to — and delivery of — that data, plus a way for users to bring in new assets for archiving and preservation.

How AMS Relates to Brandfolder

AMS combines the valuable asset-tracking functionality of a standards-based collection management system (CMS) with the interactivity and user-friendliness of Brandfolder, an enterprise-grade digital asset management (DAM) service.

You may see "Brandfolder" as you work in AMS. This simply means AMS is utilizing some of the functionality of Brandfolder. For your ease, the processing is all in one system.

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How to Register an Account (Non-SSO Users)

To gain access to AMS, a History Factory archivist must invite you to the AMS portal. To gain access, please reach out to either your History Factory archivist team, or to your company archives manager to send the request.

Once you've been approved for AMS access, you should receive an email from pleasereply@em.brandfolder.com with the subject line "I've granted you access to the AMS Demo Instance Brandfolder!" In that message, there is an "Accept Invitation" button.

1. Click the "Accept Invitation" button to start the registration process.
A new window will appear with a message informing that you have been invited to join Brandfolder. Click "or sign up for a Brandfolder account."
2. On the next screen you'll be required to put in your first name, last name, your email address, and a password for AMS. Click "Sign Up" once you've entered the information.
 - **Note:** Do not change the Email field — this is the field that will be used for receiving communications from AMS, and which will be used as your log-in email address for AMS.
 - The Password field will require a minimum of:
8 characters, 1 uppercase letter, 1 number, 1 symbol
3. After clicking "Sign Up," you should immediately see a User Acceptance Agreement pop-up. After reading through the agreement, click "Agree" to be brought to the AMS interface.

Success! You are now in AMS.

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How to Sign In to AMS

To sign in to AMS, visit the URL given by your History Factory archivist. The URL should look similar to: <https://www.brandfolder.com/your-organization-archives> where “your-organization-archives” is the specific portal assigned to your organization.

On the sign-in screen, you will see an option to select either a Single Sign-On (SSO) log-in button for your organization, or a link that states “or sign in with your Brandfolder account.”

- a. **For SSO users**, 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.
- b. **For non-SSO users**, 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.

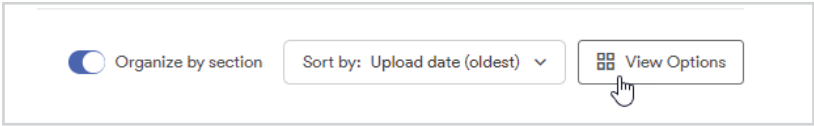
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Adjusting Your AMS View

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.

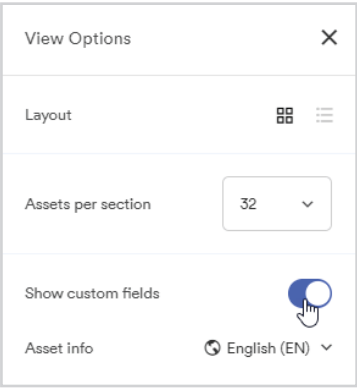
To adjust the view to include the Title field:

- 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.



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Navigating AMS

Overview

AMS is designed to be intuitive and user friendly, requiring little to no training. Below are some highlights of how you can drill down to a specific category of archived material.



Sections (red arrow) are customizable categories to which each archived item belongs. They are the broadest organizational mechanism and distinguish the type of archived item being managed by History Factory. By default, the “All” section shows archived assets that are digital and physical, as well as assets pending addition to the archival collection. By clicking on one of these sections, you will see only that specific section.

There are three main **Sections**:

- **Digital Records:** These record entries are digital files that have been archived within the catalog. They can include such assets as Word documents, PDFs, spreadsheets, images, and video and audio files.
- **Physical Records:** These record entries represent archived items available only in analog/hard copy formats. Physical records are maintained at History Factory’s Archives Lab facility. A “Not digitized” image indicates that a digital version of the item has not been created. Contact History Factory at amshelp@historyfactory.com to request digitization of a physical record.
- **Pending Records:** These record entries are digital assets that have been uploaded by a user, but have not been checked into AMS and cataloged by an archivist. Once the item has been checked in and cataloged, it will disappear from the Pending Records section and appear in the Digital Records section.

Pins (purple arrow) are global saved search queries created by History Factory archivists or your corporate archivist, so that you can search faster for specific archived items. Pins appear beneath your Sections. Clicking a pin filters your view down to only the assets that match the saved search query. If you require a specific pin for the entire organization, please reach out to your archivist to create the pinned search filter.

Labels (green arrow) are the archives hierarchy for the entire collection. The hierarchy is the organizational method used by the History Factory archivist to maintain structure for the archived items. Clicking on a label within the hierarchy will drill the archives view down to only the archived items that match the selected hierarchy. Labels have a vertical, nested structure that is drawn and managed by History Factory archivists.

Collections (yellow arrow) are a grouping of archived items by History Factory. By default, there are two collections based on the permissions granted to the portal: the General collection that contains archived items that are viewable by the entire company, and the Restricted collection that contains archived items which are more sensitive in nature.

Note: You can also search for specific archived items; see “Searching the Archives – Search Bar” for details.

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Sorting

By default, AMS is sorted by Position added. You can toggle your view to sort assets by:

- **Created:** Orders by original asset creation date.
- **Uploaded:** Orders according to upload recency.
- **Updated:** Orders according to update recency.
- **Name:** Orders alphabetically.
- **Popularity:** Popularity factors in events associated with an asset, like views, downloads, shares and more. Sort by Popularity to discover insights based on such data.



View Options

Click the “View Options” button to select your display preferences.

Layout

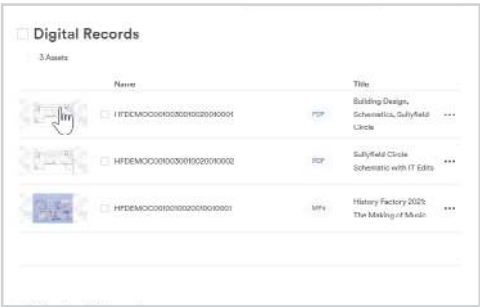
There are two options that you can choose from, Thumbnail view and List view.



Thumbnail view

By default, AMS displays assets in Thumbnail view, creating a visually intuitive approach to discovering records.

- On the thumbnail, you can see an *asset preview, resource identifier, file type, if multiple files are included, and a selection box.*
- Hovering over the archived item will highlight it and allow you to quickly view the item or download it. (Select the three dots “...” to show the quick-download menu.)



List view

To see critical information about an asset at a glance, toggle to List view in the View Options menu. This option shows small previews, names, tags and file types.

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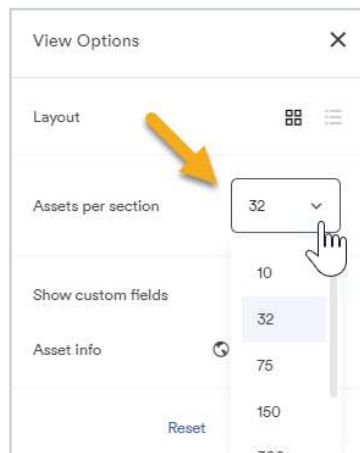
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View Options cont.

Assets Per Section and Pagination

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.



Note: Pagination quickly consumes memory on your device. If your browsing starts to slow down, select a lower number of assets per page.

Show Custom Fields

Toggling on the Show Custom Fields option will enable the Title field to display, along with the Catalog identifier used to organize the archives.

Bulk Action Toolbar

Selecting an asset or multiple assets via the checkbox next to the resource identifier of the archived item allows for bulk actions. AMS supports the following bulk actions:

- Download:** With one action, you can resize, convert, and download archived items in bulk. To download the archived items in their original resolution and format, click "Download All." To download the items after resizing and converting them to a required format, click "Download Some."
- Share:** With a single Share Link, you can share any number of archived items. Share Links can be viewed, edited, and deleted by admins.
- Add to Boards:** You can add selected archived items to a personal board so you can quickly review them later. For additional information about this feature, see Personal Boards.
- Add to Share Link:** If you already have a Share Link, you can add a newly selected archived item to that link.
- Select All Visible:** Use this to select all the archived items that you can see in your current view.
- Select None:** Use this to deselect all the currently selected assets.
- Select None:** Deselects all the current selected assets.



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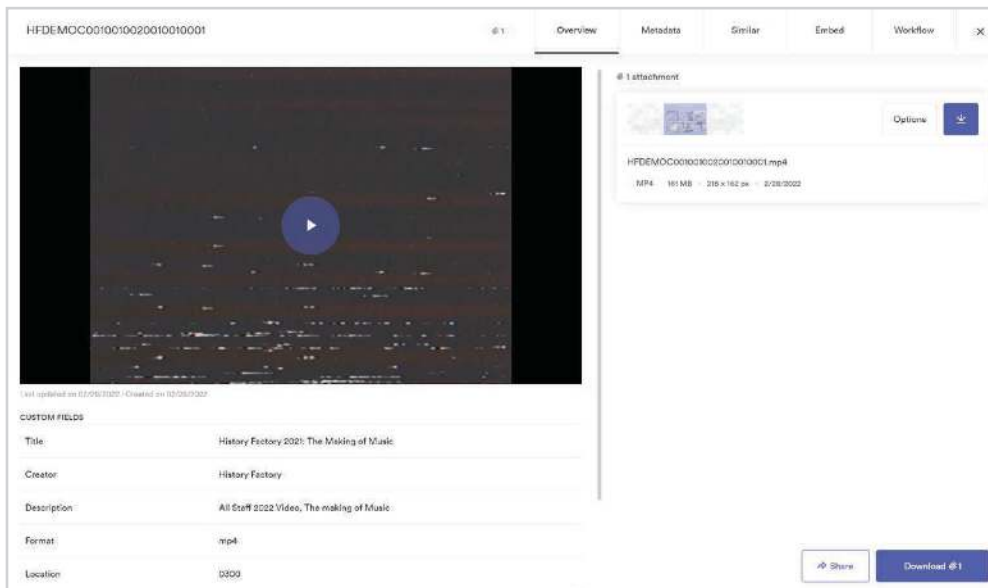
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Archived Items (Asset Modal View)

The primary view of an archived item is the Asset Modal view, a view that opens up when you double-click on an archived item within the main view. From here, you'll be presented immediately with the Overview tab, along with the preview of the artifact, as well as the History Factory catalog data for the artifact.



Overview Tab

The initial view when opening an archived item is the Overview tab. For a digital file that's an image, you can select and enlarge the preview. For a digital file that's a video, you can play the content from the Asset Modal view. In the example above, we are able to play the digital file directly through the web browser simply by clicking the "Play" button over the video.

Asset Preview

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 that you open, you will see different options:

- **For video files**, you will see a frame of the uploaded video with a "Play" button. Pressing the Play button will play the video in your browser.
- **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").

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Custom Fields

The Overview tab displays the History Factory catalog data within the Custom Fields section of the view.

CUSTOM FIELDS	
Title	History Factory 2021: The Making of Music
Creator	History Factory
Description	All Staff 2022 Video, The making of Music
Format 	mp4
Location	0300
Resource Type	Video File
Restricted	Anyone can access
Subject	All Staff
Year End	2022
Year Start	2022

The cataloged data from the archivist team include:

- **Title:** A name given to the asset.
- **Creator:** An entity primarily responsible for making the asset. A Creator can be a person, an organization, or a service.
- **Description:** A free-text account of the asset. This element provides information that cannot be accommodated in any of the defined fields of description. It includes but isn't limited to information on sources of descriptive information, title variations, statements of responsibility, signatures and inscriptions, attributions and conjectures, editions, and dates.
- **Format:** The physical medium of the asset.
- **Location:** A pointer to whether the asset exists, whether that's to a file system or to a shelf, drawer or other container at a storage facility.
- **Resource Type:** The nature or genre of the asset.
- **Restricted:** Information about who can access the asset based on privacy, security, or other policies [an indication of the security status of the asset].
- **Subject:** A topic of the asset.
- **Year Start:** Date of creation of the asset; or, if the assets in the unit being described span a period of time, the earliest date of the assets.
- **Year End:** Date of creation of the asset; or, if the assets in the unit being described span a period of time, the latest date of the assets.

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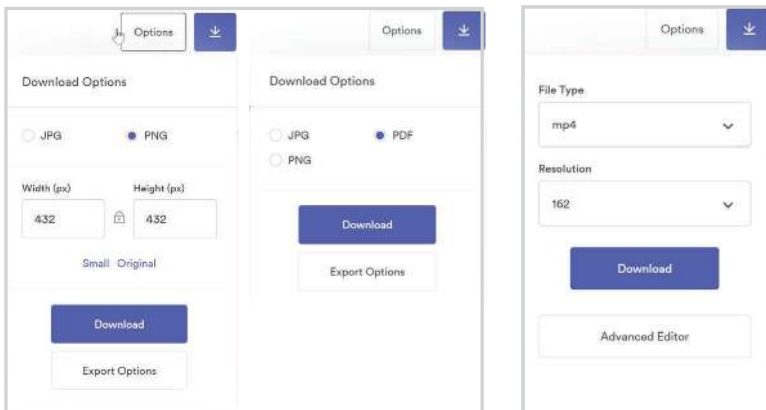
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Options

Next to the preview of a digital item, there are two buttons for downloading it. You can download the item as is, or convert/edit the item prior to download. To bring up the option to edit and convert the item before downloading the file, press the “Options” button.



For image and document files, you can open the Export Options window to find more conversion options.

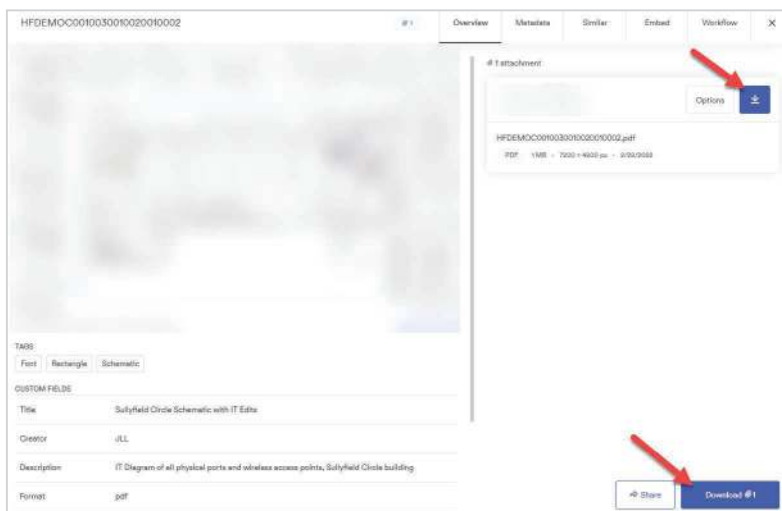
For video files, you will see an option instead for the Advanced Editor, which allows you to trim the video content, as well as convert it to different formats.

Note: Advanced Editor does *not* edit the archived item. Instead, Advanced Editor allows you to edit it to the required dimensions or format so you can download it as a new file.

Download and Share

The Asset Modal view will allow you to share and download the archived content directly from the summary view. Pressing the Download icon or pressing “Download” in the lower right corner of the Asset Modal view will allow you to download the archived item.

For additional information about sharing archived content, please see Sharing Archived Items.



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Download and Share cont.

Crop/Resize Images and Videos for Download

Before downloading an image or video, AMS allows you to crop and resize the file. For images, AMS comes with preloaded templates to crop the image to fit specific social media platforms, such as Facebook, Instagram, Twitter, LinkedIn, and Pinterest.

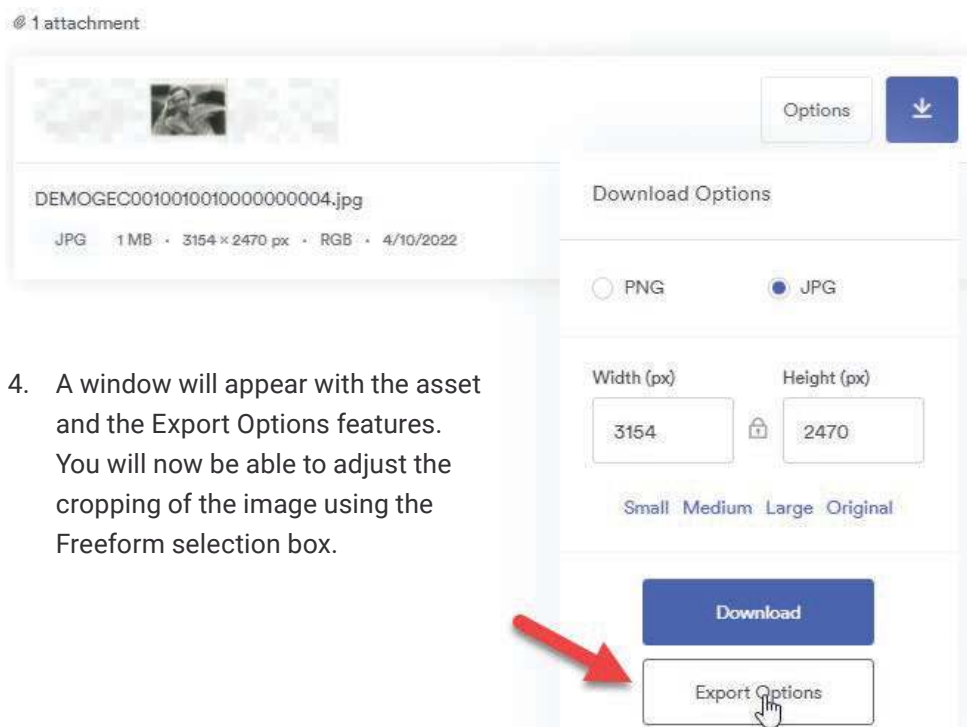
Cropping will not change the archived item already preserved in AMS. The crop will change only the version of the item being downloaded to your local device.

Crop and resize images before downloading

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.

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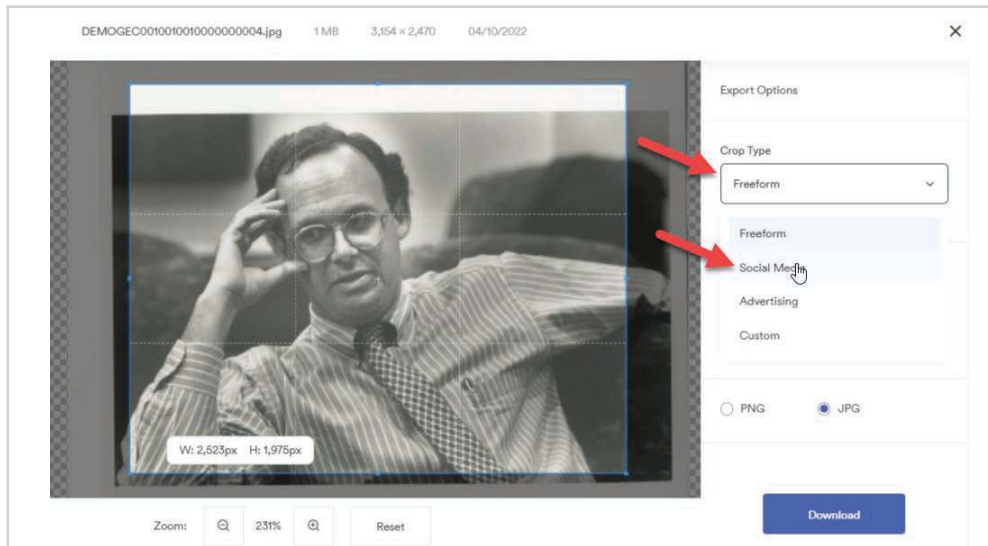
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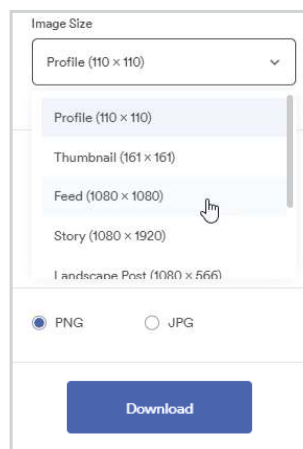
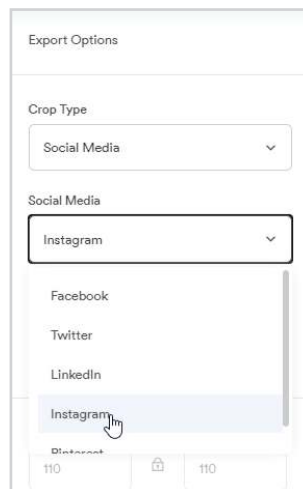
Need Help?

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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.



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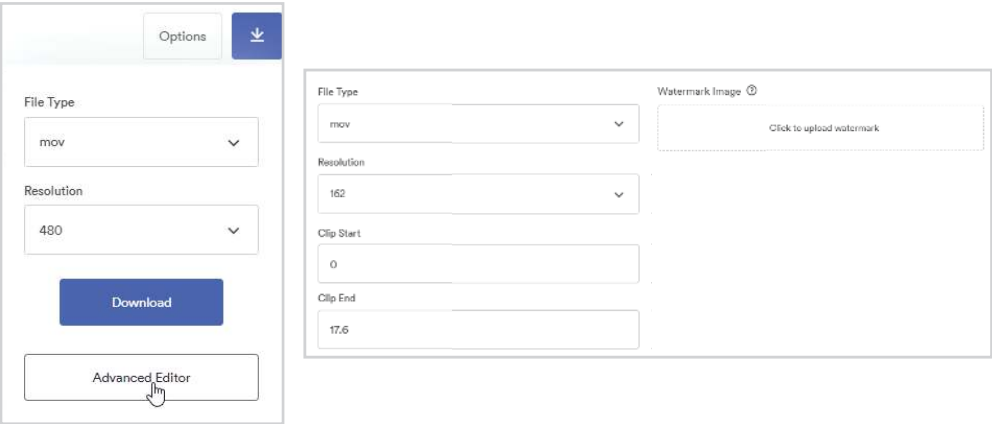
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Shorten or reformat video clips before downloading

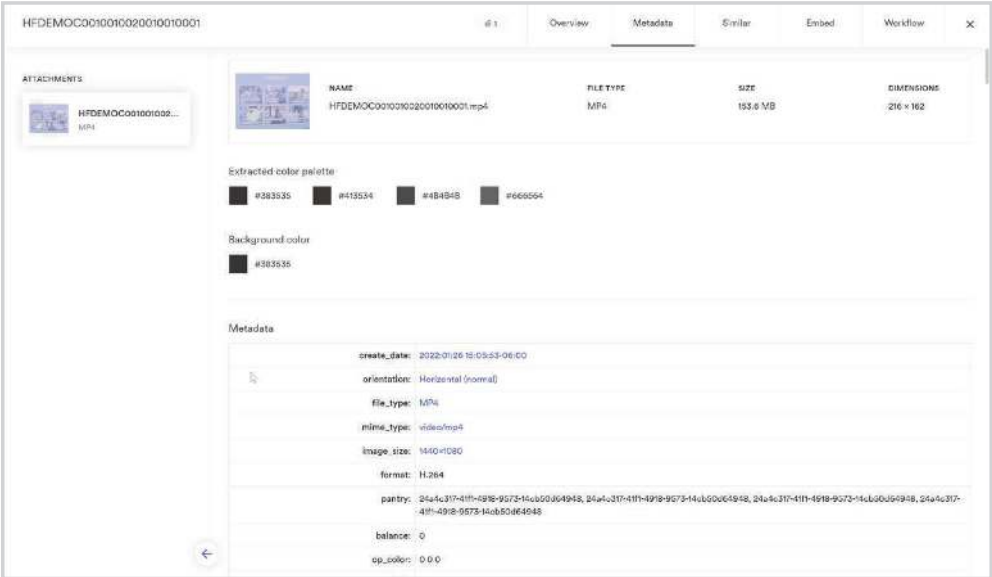
Before downloading videos archived in AMS, you can shorten clips and change formats. These options, as well as the ability to add a watermark to the video, are available under Advanced Editor when you click the “Options” button.



Metadata Tab

On the Metadata tab, you can quickly see all associated EXIF metadata and additional details for each file or attachment. The information you see on this tab is indexed by AMS, and searchable through the search bar.

For document files and PDFs, as well as images with legible character text, AMS will perform **optical character recognition** (OCR) to index text within the digital file as well.



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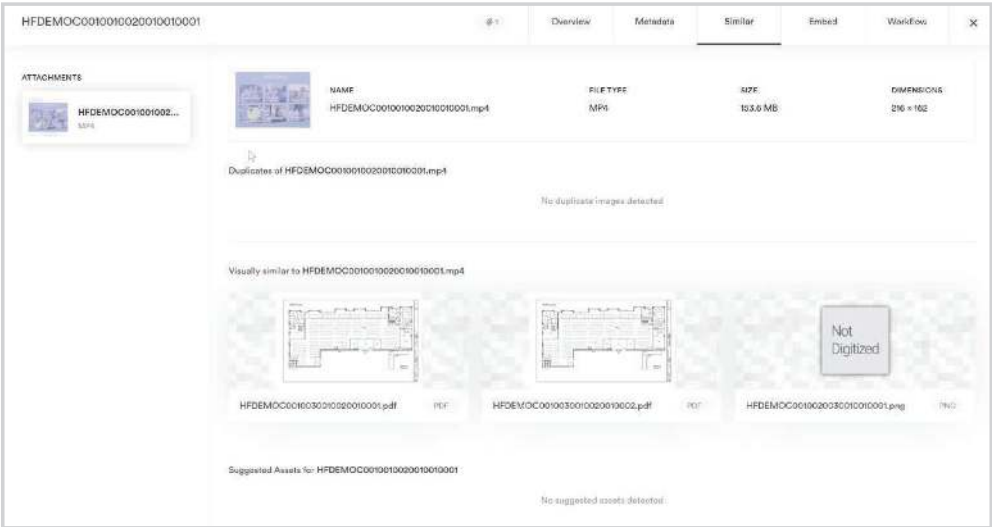
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Similar Tab

This tab allows you to see all assets that are similar to the selected asset as well as any duplicates that may exist. Duplicates show other files that are exact duplicates of the attachment selected.

Visually Similar attachments are based on the tags, both custom and AI-based and will show attachments that have the most tag overlap. This function also determines the most similar attachments based on pixel-level data. This works at the attachment level and will be different for each attachment on an asset. If attachments do not have tags or the tags do not overlap significantly with any other attachments, this section will be blank. These items will change over time as the AI visually understands the archived content.

Suggested Assets are based on user behavior. This function works at the asset level and surfaces assets most often accessed together in the same user session, but across all users within AMS. You can think of it as an average of what all users are retrieving. So, the more users and usage in AMS, the better these suggestions become. For example: If people often use the same set of assets to build a PowerPoint presentation, these items would all come up as suggestions for one another. Suggested Assets are the same for all users.



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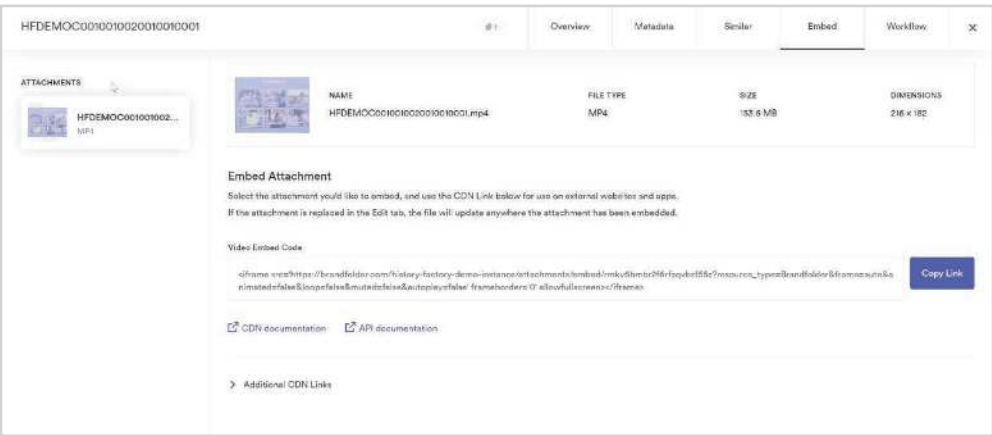
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Embed Tab

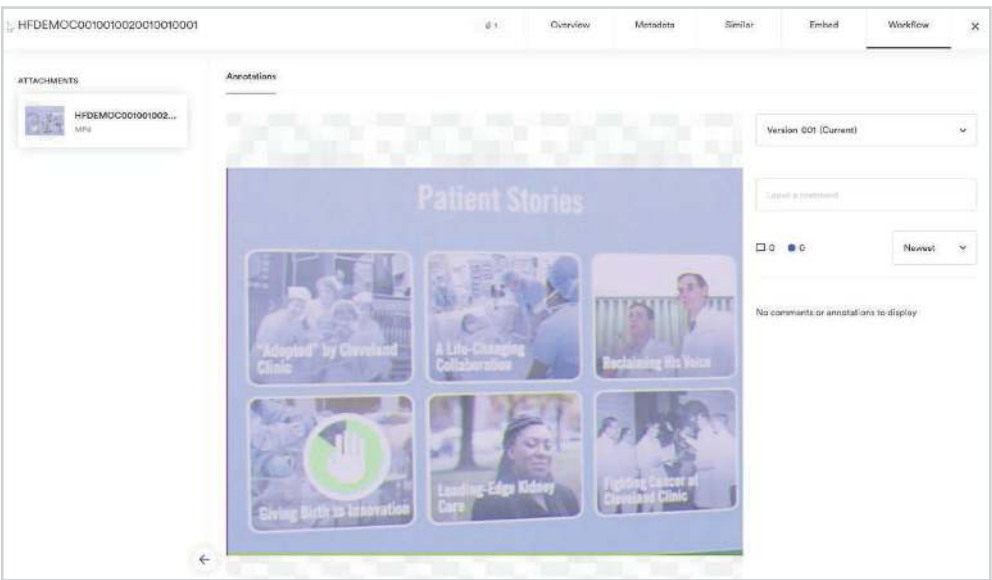
This tab allows you to embed any file using the Brandfolder platform’s content delivery network (CDN). You can then customize this link by selecting which file type it should be and, if necessary, which file size. This customization will populate that information directly within the link for the converted asset. It also will ensure that you will be viewing the item from the Brandfolder platform data center closest to your internet provider.

Pressing the “Additional Links” option will allow you to find other links that you could embed to your presentation or document.



Workflow Tab

In the Workflow tab, you can make annotations and comments on an archived item for others in your organization to see. This tab also lets you track version history, so you can see older versions of archived items.



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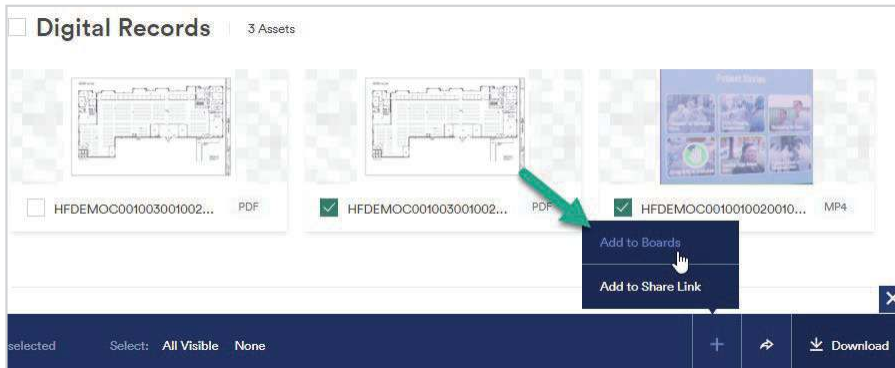
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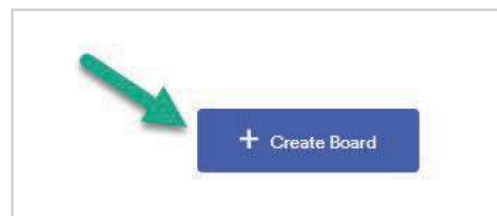
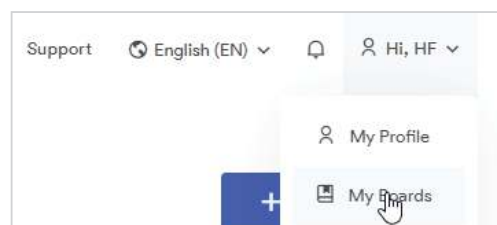
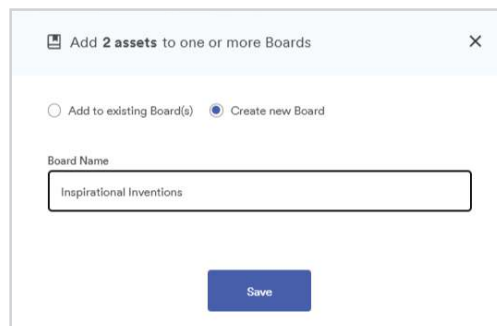
Personal Boards

You can use Personal Boards to create a curated view of archived items specific to your needs. Whether you save items for later reference, or collect archived items for motivation or inspiration, Personal Boards can only be viewed by you. Neither History Factory archivists nor administrators can see Personal Boards.

- 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 this example, 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: Boards can’t be shared with other users; they are only for personal use.

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Sharing Archived Items

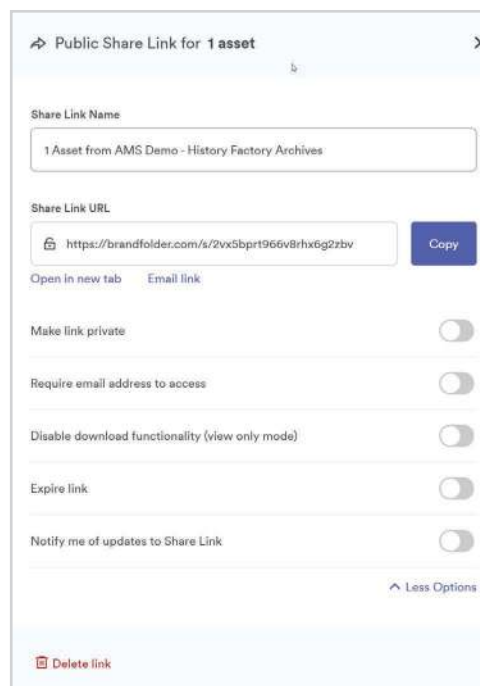
You can share archived items directly with other users on your system, or with the public. AMS will generate the links for sharing.

Note: Depending on your company's policies, public sharing may be disabled.

To share an archived item with 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.
 - **Make link private:** This will ensure that only users with access to AMS can open the link. **Note:** The "require email address to access" option will automatically disappear if you select this, as this requires someone to be logged in to AMS.
 - **Require email address to access:** You can restrict the Share Link to users who have email addresses associated with the Brandfolder platform.
 - **Disable download functionality (View Only mode):** You can prevent shared items from being downloaded by toggling.
 - **Expire link:** You can set the Share Link to expire at a specific date/time.
 - **Notify me of updates to Share Link:** You can set alerts for items that are viewed or downloaded.



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Searching the Archives

Search Bar

AMS is designed to help you find your most valuable assets fast and in a way that makes sense. The system lets you see internal search functions so that, on your way to finding the archived item you need, you also gain an understanding of your organization’s classifications. Searches go through all the fields in the platform, including text that may have been captured from within such archived items as Word documents, PDFs, PowerPoint presentations, and any image file that passed through optical character recognition.

Any of these terms

Q Search

Any of these terms

All of these terms

Contains this phrase

Exactly this phrase

Organize by section

Sort by: Upload date (oldest)

Four options help narrow your search:

- Any of these terms:** Of all the options, this allows the most flexibility for returned results. When searching for **cliff divers**, the query will come back with any asset that has “cliff” or “divers” present in at least one of its indexed fields. This is an ideal search mechanism when you aren’t quite sure what the asset you are looking for is named or how it’s been tagged. Only one of the terms needs to match for an asset to be returned.
- All of these terms:** This option allows you to be more precise in your search by replacing the flexibility of OR with AND. In the example above, when searching for **cliff divers**, the result will come back with any asset that has “cliff” and “divers” across any of its indexed fields. The two terms do not need to be part of the same field (“cliff” could be in the name while “divers” might be a tag), but all terms do need to be present somewhere for an asset to match.
- Contains this phrase:** This option is a great choice if you know part of an asset’s name or a bit of text in its description. By searching **cliff divers** using this option, it will pull in all assets that contain that phrase. For example, an asset with a name of “cliff divers in the ocean” would be returned since the name contains “cliff divers.” It will not return results where the terms are spread across multiple indexed fields.
- Exactly this phrase:** This is the strictest of the four options and requires you to be precise when searching. For example, searching **cliff divers** with this option would *not* return an asset named “cliff divers in the ocean” in your results. You would need to type the full name, nothing less and nothing more, for an asset to match.
Note: We do not recommend using this option when searching for a phrase. We recommend using **Contains this phrase** instead.

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Search Filtering

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. Search is case insensitive (except for OR and AND search operators), meaning LOGO and logo will return the same results. **Note:** When using search operators, we recommend using the “any of these terms” search filter option.

Here's an exhaustive list of details you can use to scope your search:

- **Name** (This is the resource identifier string.)
- **custom_fields.Title** (This is the Title field for an archived item.)
- **custom_fields.Creator** (This is the Creator field for an archived item.)
- **custom_fields.Description** (This is the Description field for an archived item.)
- **custom_fields.Year Start** (This is the Year Start date for an archived item.)
- **custom_fields.Year End** (This is the Year End date for an archived item.)
- **custom_fields.Provenance** (This is the Provenance information for an archived item.)
- **custom_fields.Location** (This is the location where an archived item is stored by History Factory.)
- **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**

Here are some examples:

- **custom_fields.Location:"1000"** (displays all items that have a location of 1000)
- **custom_fields.Title:"Group portrait"** (displays all items that have the phrase "Group portrait" in the title of an archived item)
- **extension: jpg** (all archived items that are JPG attachments)
- **published_at: 2019-02-02**
- **labels: "Buildings"** (displays all archived items that are part of the "Buildings" hierarchy within the labels taxonomy)
- **width:>435**
- **expires_at: [2020-05-01 TO 2020-05-31]**

Search Operators

The default search operator is **OR**, meaning if you search for **blue gray** it will search for assets containing blue **OR** gray. By default, **OR** is implied as the operator between search terms.

- You can change the search operator to **AND** by explicitly adding the keyword **AND** (all caps) or **&&** in between search terms:
tags:logo AND blue,
tags:logo && blue
- If you are looking to exclude assets that are in a specific collection or tag, you can use **NOT**. This would be written as: **NOT tags: "logo"**
- Searching for assets that do not have labels associated with them would be written as:
NOT label: *

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Searching for Phrases

If you want to search on phrases or terms with multiple words, wrap the phrase in quotation marks. For example, AMS will consider “blue fox jumps” as a single search term whereas blue fox jumps will count as three separate search terms and result in searching for blue OR fox OR jumps.

“blue fox jumps”

Shorthand Search Syntax

If you want to search for assets with multiple tags, there is no need to type tags:logo OR tags:“product shots” OR tags:image. This entire search can be written as:

tags:(logo “product shots” image)

Remember, OR is implied between search terms, and you can override the same query by using AND

tags:(logo AND “product shots” AND image)

Wild Cards and Fuzzy Matching

If you want to find any asset that partially matches a search query, use the * Wild Card operator like so:

prod*

This will return assets that contain words like “product” or “production.”

Likewise, if you want to find assets that have words close to your search term (essentially misspellings), use the ~ Fuzzy Match operator:

wednesday~

This will match assets with “wednesday” as well as with the common misspelling “wendsday.”

Note: Wild Cards are not supported at the beginning of the search term.

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Advanced Search Queries

While the simple syntax above will find what you need in most cases, you can further narrow down results in advanced ways with the following queries.

(This is a working list.)

- **expires_at:>now-30d**
(assets expired in the last 30 days)
- **updated_at:>now-1d**
(assets updated in the last day)
- **created_at:>now-10m**
(assets created in the last 10 minutes)
- **created_at:>now-2h**
(assets created in the last 2 hours)
- **custom_fields.Title:"abc123"**
(returns archived items that have a title of "abc123" within the Title field)
- **custom_fields.Creator: first name last name** (returns archived items that have the name within the Creator field)
- **custom_fields.Description: Phone** (returns archived items that have the word "Phone" within the Description field)
- **NOT custom_fields.Title: Plane** (returns items that do not have the word "Plane" within the title field of an archived item).

Reserved Search Characters

><(){}[]"* are reserved characters and cannot be used as/in search terms.

Instead, they can be used as search operators that modify your query as a whole.

Likewise, **! ? + - / \ ~ ^ =** characters have special meaning, but AMS's search is smart enough to know when you're searching for the phrase **Look out!** as opposed to looking for any asset that does not match the word "logo" (in the case of **!logo**).

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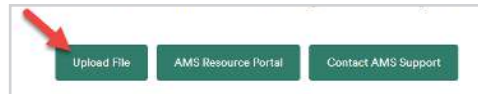
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Uploading New Digital Items

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 this example, 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 subtitle is 'Upload an item to the AMS Demo Instance.'. It has 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.'. At the bottom is a blue button labeled 'Select files for upload'.

 A screenshot of the same web form, but now showing a file upload section. It has a dashed border box with a plus sign (+) in the center and the text 'Drag file(s) here or click to browse' below it.

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.

Submitting New Physical Items

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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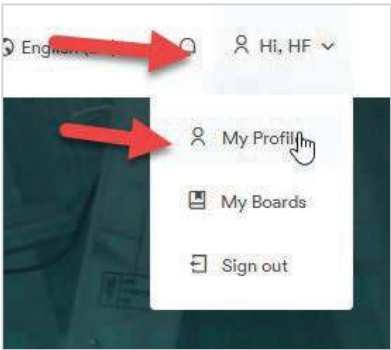
Viewing Your Profile

From your AMS profile, you can see the current AMS organizations you have access to, as well as any boards you've created.

To view your profile once you are signed in to AMS:

1. Click on "Hi, [Your First Name]" at the upper right corner, where [Your First Name] is the name set for your AMS profile.
2. Click "My Profile" from the drop-down menu that appears.

In this example, the user HF can access their profile by clicking on the "Hi, HF" link on the upper right corner, followed by "My Profile."



View Recent Notifications from AMS

AMS notifies users of changes within the system, such as new digital items that were added to the archive, or existing items that were changed. To view the active notifications, click the bell icon in the upper right corner. This will open the "Notifications" page.



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Adjusting Your Notification Settings

You can adjust how AMS notifies you of additions and changes, so that you can receive either general and collection-specific notifications by email or simply see these updates only when logged in. To adjust your notification settings:

1. Click on “Hi, [Your First Name]” at the upper right corner, where [Your First Name] is the name set for your AMS profile.
2. Click “My Profile” from the drop-down menu that appears. This will open the Profile page.
3. Click on the “Notification Settings” link on the left sidebar within the profile page.
4. From the Notification Settings page, you can select if you want to receive emails from AMS, or notifications only for a specific collection (such as the General collection only, or the Restricted collection only).

In the example below, HF Test User will receive emails from the AMS Demo, not including the General or Restricted collections:

History Factory

In appEmails

☒

AMS Demo - History Factory Archives

✓

☒

Collections For "AMS Demo - History Factory Archives"

☐

Demo History Factory - Restricted

☐

Demo History Factory - General

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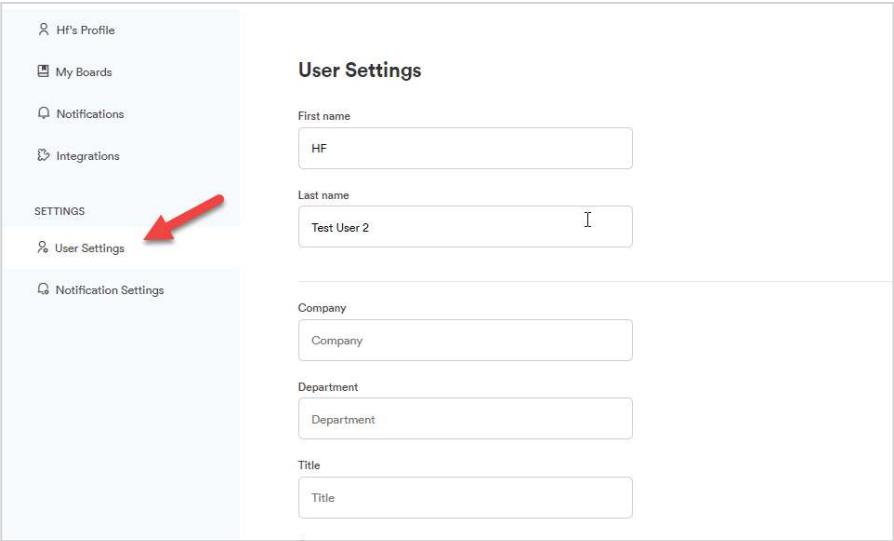
Adjusting Your Profile Information

From the Profile page, you can adjust your user information, such as your Company name, Department name, Job Title, Country of work, and language. This is also the page where you can change your password, if you need to reset your password.

Note: Adjusting Locale to a different language will not change the language of archived items. They will still display in English.

To adjust your profile information:

1. Click on “Hi, [Your First Name]” at the upper right corner, where [Your First Name] is the name set for your AMS profile.
2. Click “My Profile” from the drop-down menu that appears. This will open the Profile page.
3. Click on the “User Settings” link on the left-hand sidebar on the Profile page.



4. From the User Settings page, adjust the information you need to. Once you’ve finished making adjustments, click on “Update Info.”

Note: To change your password in the “New Password” field, you must enter your current password in the “Current Password” field prior to clicking “Update Info.”

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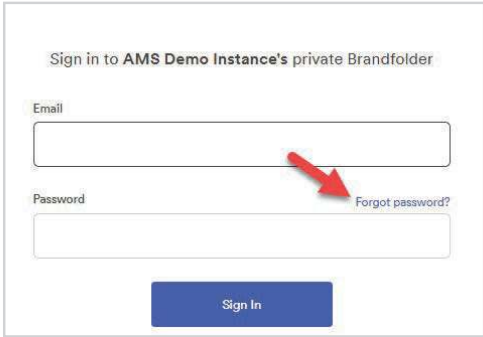
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Resetting Your Password (Non-SSO Users)

If you forgot your AMS password, and your organization uses the “sign in with your Brandfolder account” link to sign in to AMS, follow the steps below to reset your password:

1. On the AMS log-in page, click “or sign in with your Brandfolder account.”
2. Click on the “Forgot password?” link next to the password field.
3. On the Reset password screen, enter your AMS email address and click “Recover Password.”
4. A password reset email will be sent from Brandfolder to your email address with “Reset your password” in the subject field. Follow the instructions in the email to reset your AMS password.
 - History Factory archivists cannot view your password nor reset your password on your behalf.
 - If you are an SSO user, please reach out to your IT support team to reset the SSO password within your organization.



Need Help?

Should you have any issues with browsing AMS, finding an item, or uploading a new item, please contact your company’s dedicated History Factory archivist.

Additionally, you can reach out to the History Factory archivist team by clicking “Contact AMS Support.” This will start an email message to our AMS Support team. Or, you can simply email amshelp@historyfactory.com if you want to reach out directly to the AMS team.



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historyfactory.com/ams

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