



## Historical Society Administrator Guide

*Features and benefits are continuously added, so some screenshots contained in this guide may not exactly match what you see live. Please contact us with any questions.*

### Ready to Digitize your Archive Content?

We scan newspapers in bound volumes, loose/folded, microfilm; photos, slides, negatives, movies, books, magazines; and oversize materials such as maps, drawings, and artwork. Our work is “all inclusive” of shipping containers, shipping & logistics, scanning, processing, and hosting.

SCAN CENTERS LOCATED IN

**Washington, Michigan & Maryland**

Contact Paul Jeffko [paulj@smalltownpapers.com](mailto:paulj@smalltownpapers.com)

For technical assistance, training, and support, admins are invited to contact ArchivelnABox 24/7 by clicking “Create Trouble Ticket” on the left side of the admin management dashboard or, call 360-427-6300 8a.m. – 5p.m. PST Monday through Friday.

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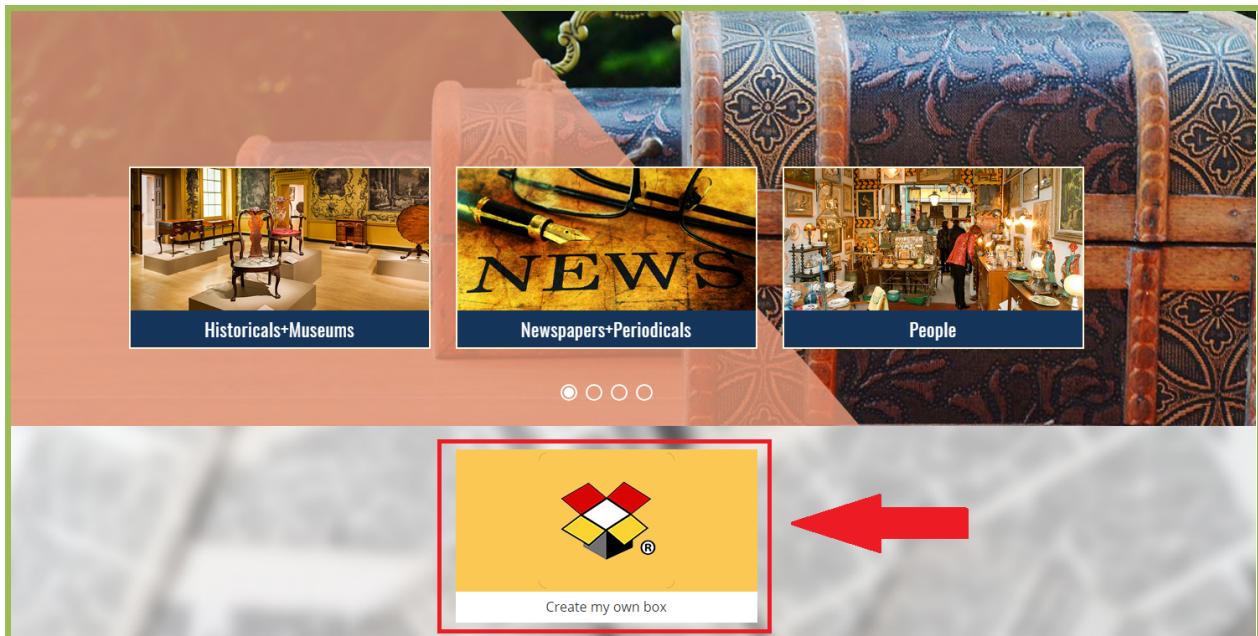
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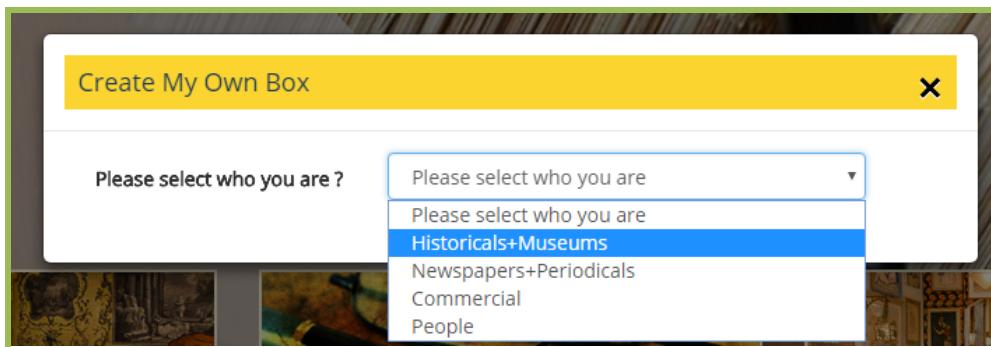
## Step 1: Register for an account

Go to [www.archiveinabox.com](http://www.archiveinabox.com)

Scroll down and click “Create my own box”



Select “Historicals+Museums” in the drop down



Click “Register Your Society”

## Connect with people who discover and share your history.

Join our established group of **Historical Societies and Museums** who share content by publishing their collections online. All published content is available to anyone, anywhere in the world. Connect your archive with people who can discover and share your history.

[Register your society](#)

[Back to Archive](#)



### Easy to use. Build your brand.

ArchiveInABox for **Historicals** is designed to make the most of your time. Tools help streamline all processes. Templates automate repetitive tasks. Easy management of your brand, messaging, and advertising. Place house ads anywhere and push your brand throughout your archive.



Fill out the form, then click “Next”

### Historical Society Information

Historical Society Name\*:

State\*:

### Contact Information

First Name\*:

Last Name\*:

Title\*:

Username\*:

Email\*:

Phone Number\*:

Preferred Time Zone\*:

[Next](#)

Fill out the next form, then click “Next”

### Location Information

Physical Address	Mailing Address
<input type="checkbox"/> Same As physical Address	
Address Line 1*: <input type="text" value="Enter text"/>	Address Line 1*: <input type="text" value="Enter text"/>
Address Line 2: <input type="text" value="Enter text"/>	Address Line 2: <input type="text" value="Enter text"/>
City*: <input type="text" value="Enter text"/>	City*: <input type="text" value="Enter text"/>
State*: <input type="text" value="Enter text"/>	State*: <input type="text" value="Enter text"/>
Zip*: <input type="text" value="Enter text"/>	Zip*: <input type="text" value="Enter text"/>

### Tax Information

Federal Tax ID Number: <input type="text" value="Enter text"/>	
State Tax ID Number: <input type="text" value="Enter text"/>	
Entity Organization: <input type="text" value="501 Non-profit"/>	

### Other Information

Redactions Email Address: <input type="text" value="Enter text"/>	
Reprint Email Address: <input type="text" value="Enter text"/>	
Contact Email Address: <input type="text" value="Enter text"/>	
Website URL: <input type="text" value="Enter text"/>	

### Organization Structure

Select all that apply

<input type="checkbox"/> Board of Directors	
<input type="checkbox"/> CEO	
<input type="checkbox"/> Executive Director	
<input type="checkbox"/> president	
<input type="checkbox"/> Other Executive	
<input type="checkbox"/> Committees	

You will be taken to a page where you can review the information you entered for your account. To edit the information, click “Edit” in the top right corner

**Historical Society Information**

Historical Society Name*:	Shelton Historical Society	<b>Edit</b>
State*:	WA	
<b>Contact Information</b>		
First Name*:	Cody	
Last Name*:	France	
Title*:	Owner	
Username*:	SHS	
Email*:	cody@smalltownpapers.com	
Phone Number*:	(123) 123-1234	

Once you have confirmed that all the information is correct, you will need to agree to the Terms of Service before clicking "Submit"

I agree to the [Terms of service](#)

**Terms of service** X

**Print**

Legal Notices – AIB TERMS OF USE

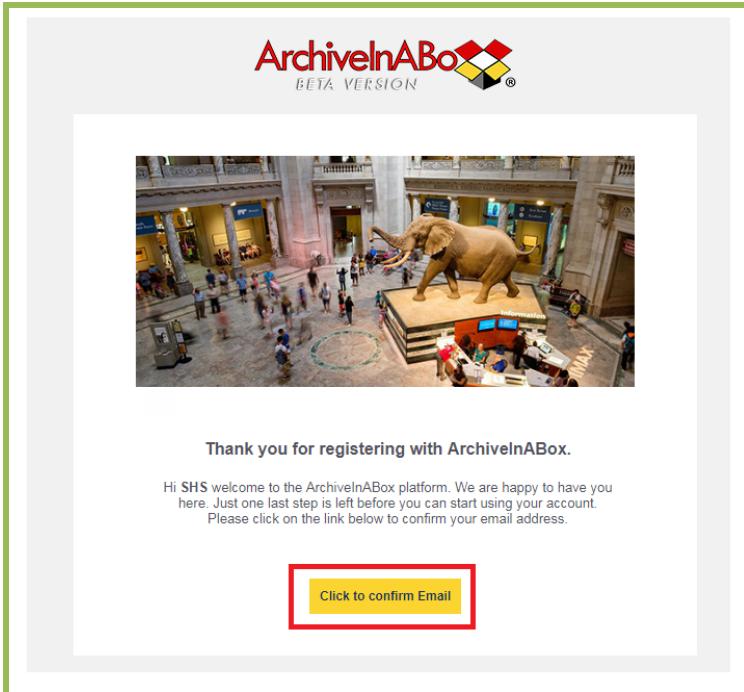
Please carefully review the following basic rules that govern your use of the Web Site. Please note that your use of the Web Site constitutes your unconditional agreement to follow and be bound by these Terms of Use. If you (the "User(s)") do not agree to them, do not use the Web Site, provide any Content to the Web Site or download any Content from the Web Site. The Terms of Use applies to you as an individual and any entity you represent in your capacity of using the Web Site, including providing published Content to Users.

AIB reserves the right to update or modify these Terms of Use at any time.

**Yes I agree**    **No I do not agree**

**Submit**

At this point the system will send you an email which you will need to click the validation link in



You will be taken to a page where you will setup your password

Please choose your password

Password :

Confirm Password :

Yes, please send me occasional updates, training materials, or marketing from ArchivelnBox

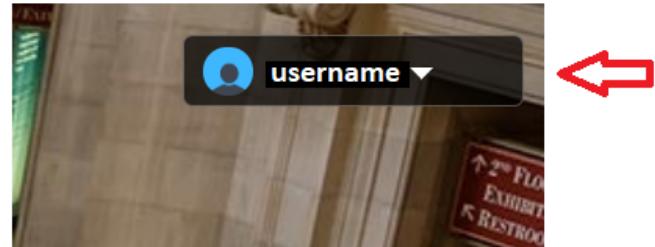
I agree to the [Terms of service](#)

**Confirm**

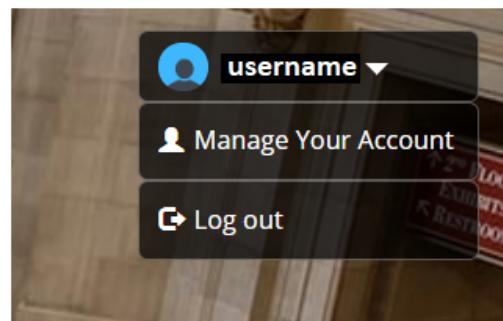
At this point, the system will alert the ArchivelnABox who will review your account for approval. Once your account has been approved, the system will send you an email to notify you that your account has been approved and you can log in and begin building your archive!

To log into your account, click on the "Login" button in the top right corner of any page on [www.archiveinabox.com](http://www.archiveinabox.com)

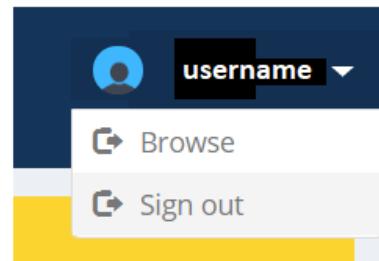
After you log in, you will see this icon in the upper right side.



Click on it to toggle between Manage and Public View



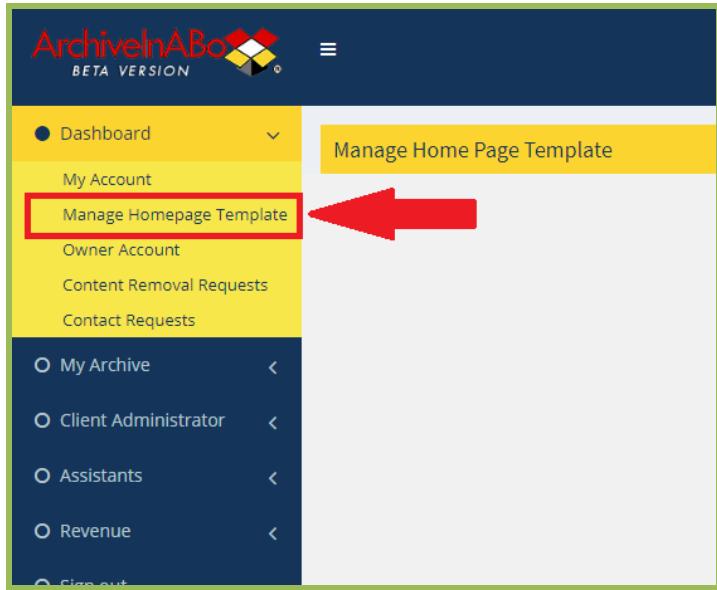
**Manage as Administrator**



**Browse in Public View**

## Step 2: Setup your homepage

Click “Manage Homepage Template” in the menu on the left side



Use the tabs at the top of the page to update the different parts of your homepage.

First, is the Basic Information tab

Manage Home Page Template

Basic Information   Contact Information   Images

Historical Society Name : ?

Display Name : ?

Address : ?

About Content : ?

Detail Description : ?

Request Reprint Text : ?   
File   Edit   View   Insert   Format   Table  
Paragraph   B   I   S   A   A   ⌂   ⌂   ⌂

Upcoming Events Text : ?

**Update**   **Clear Form**

Next is the Contact Information tab

The screenshot shows the 'Contact Information' tab selected in a navigation bar. Below it is a form with the following fields:

- Preferred Time Zone :
- Contact No. :
- Website :
- Hours :
- Watermark Text :
- Display State :
- Display County :
- Display City :
- Display Zip :

At the bottom are two buttons: 'Update' (dark blue) and 'Clear Form' (red).

And finally, the Images tab

The screenshot shows the 'Images' tab selected in a navigation bar. Below it is a form with the following fields:

- Logo Image :   
(Must be at least 200 X 200 (Width X Height))
- Banner Image :   
(Must be at least 1600 X 340 (Width X Height))
- Promotional Image :   
(Must be at least 600 X 400 (Width X Height))
- Promotional Image URL :
- Archive Group Thumb :   
(Must be at least 400 X 400 (Width X Height))
- Record Display Page Logo :   
(Must be at least 400 X 400 (Width X Height))
- Hist. Connection Logo :   
(Must be at least 200 X 200 (Width X Height))

At the bottom are two buttons: 'Update' (dark blue) and 'Clear Form' (red).

Shelton Historical Society

<b>Historical Society Name :</b>	Shelton Historical Society
<b>Address :</b>	927 W Railroad Ave. Shelton, WA 98584
<b>About Content :</b>	The Shelton Historical Society is dedicated to preserving the history of the Shelton, WA.
<b>Detail Description :</b>	The Shelton Historical Society was founded in 1927 by Mr and Mrs Smith. Our goal is to.....
<b>Request Reprint Text :</b>	<p>File ▾ Edit ▾ View ▾ Insert ▾ Format ▾ Table ▾</p> <p>Paragraph ▾ B I S A ▾ A ▾ 🔍</p> <p>(Non-media use)</p> <p>One Page: \$24.00</p> <p>Two Pages: \$30.00</p> <p>Three or More Pages: \$10.00 each</p> <p>P 17 WORDS</p>
<b>Upcoming Events Text :</b>	Upcoming Events Text
<b>Preferred Time Zone:</b>	UTC-8: Pacific Standard Time (PST) ▾
<b>Contact No. :</b>	(360) 427-6300
<b>Website :</b>	www.sheltonhistorical.com
<b>Hours :</b>	8am - 5pm Monday - Friday
<b>Watermark Text :</b>	SheltonHistorical
<b>Display State :</b>	Washington
<b>Display County :</b>	Mason
<b>Display City :</b>	Shelton
<b>Display Zip :</b>	98584
<b>Logo Image :</b>	Choose File (Must be at least 200 X 200 (Width X Height)) 
<b>Banner Image :</b>	Choose File (Must be at least 1600 X 400 (Width X Height)) 
<b>Details Image :</b>	Choose File (Must be at least 645 X 430 (Width X Height)) 
<b>Archive Group Thumb :</b>	Choose File (Must be at least 400 X 400 (Width X Height)) 
<a href="#">Update</a> <a href="#">Clear Form</a>	

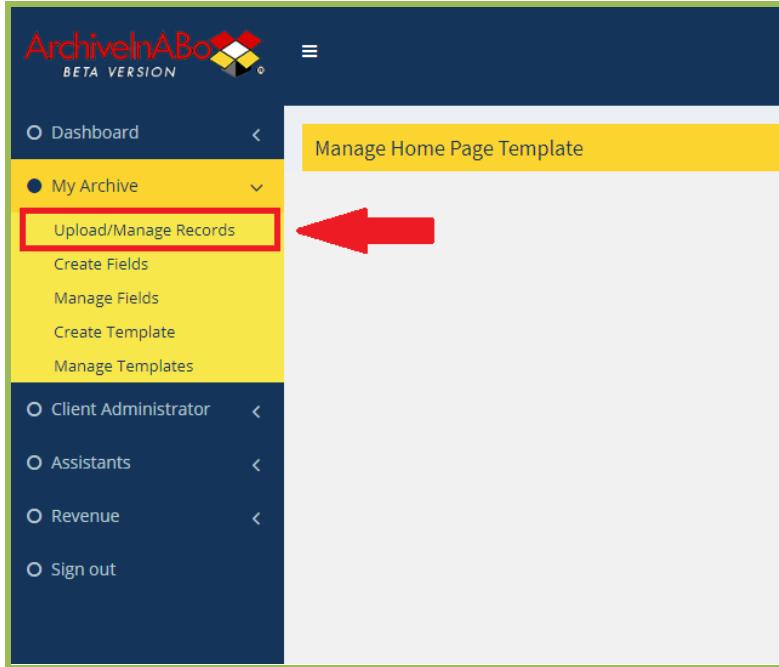
You can view your homepage by clicking on your username in the top right corner of the page, then selecting “Browse” in the menu.

Based on the above setting, here is what your homepage will look like:

The screenshot displays the homepage of ArchivelnABo. At the top, there is a banner featuring a desert landscape with mesas. Overlaid on this is a circular logo for "HISTORIC DOWNTOWN WILMINGTON 1810". In the top right corner, there is a "LOGIN" button. Below the banner, on the left, is a Google Map showing the address "927 W Railroad Ave" with a red marker. To the right of the map is the header "Shelton Historical Society" and a "Contact" button. Further down, it says "We are located at: 927 W Railroad Ave. Shelton, WA 98584" and features a "ENTER my archive" button with a green arrow icon. On the right side of the page, there is a sidebar with several sections: "CONTACT INFO" (with contact number (360) 427-6300 and website www.sheltonhistorical.com), "DETAIL DESCRIPTION" (with a link to the website), "HOURS" (listing hours from 8am to 5pm Monday-Friday), and "UPCOMING EVENTS" (noting "No upcoming events"). The main content area shows a photograph of the interior of a historical society office, featuring bookshelves filled with books, a large wooden desk, and framed historical photographs and documents on the walls.

### Step 3: Setup your Archives, Collections, and Sub Groups

Click “Upload & Manage Records” under the “My Archive” section of the menu on the left



Click “Create Archive”



A popup will appear where you can enter your archive name. The archive is going to be your very top level of organization. Some examples of archives may be Historic Photos, Historic Documents, Events, etc.

Or some other examples would be Smith Family, Jones Family, City Hall, Simpson Logging Company Archive. How you name and organize your Archive, Collections, and Sub Groups, is completely up to you!

After creating your archive(s), click on an archive title

The screenshot shows the 'Manage Records' interface for the 'Shelton Historical Society'. At the top, there's a yellow header bar with the text 'Manage Records'. Below it is a breadcrumb navigation bar: a house icon, 'Shelton Historical Society', and 'Historic Photos'. On the left, there's a dark blue 'Create Archive' button. To its right is a dropdown menu 'Show 100 entries'. The main area is a table with a light blue header row labeled 'Title'. Three entries are listed: 'Historic Documents', 'Historic Events', and 'Historic Photos', which is highlighted with a red border. At the bottom, a message says 'Showing 1 to 3 of 3 entries'.

Click on “Create Collection”

The screenshot shows the 'Create Collection' interface for the 'Historic Photos' collection. It features a yellow header bar with 'Manage Records'. Below it is a breadcrumb navigation bar: a house icon, 'Shelton Historical Society', and 'Historic Photos'. On the left, there's a dark blue 'Create Collection' button, which is highlighted with a red box. To its right is a dropdown menu 'Show 100 entries'. The main area is a table with a light blue header row labeled 'Title'. There are no entries listed, as indicated by the message 'Showing 0 to 0 of 0 entries' at the bottom.

A popup will appear where you can enter the Collection name. You can also choose whether you want this collection to be visible to the public. In this case we are using the “Historic Photos” Archive that I created. Some examples of Collections within this archive may be Downtown, Buildings, Events, etc. Or you could organize them by year, decade, etc.

Click on a Collection name to open the collection

The screenshot shows a table with three rows of data. The columns are labeled 'Title', 'Type', and 'Created'. The first row contains 'Downtown Buildings', 'Collection 0 Sub-Group(s)', and '06/15/2'. The second row contains 'Events', 'Collection 0 Sub-Group(s)', and '06/15/2'. The third row, 'Logging', is highlighted with a red rectangular box around its entire row. It also contains 'Collection 0 Sub-Group(s)' and '06/15/2'. At the bottom of the table, it says 'Showing 1 to 3 of 3 entries'.

Title	Type	Created
Downtown Buildings	Collection 0 Sub-Group(s)	06/15/2
Events	Collection 0 Sub-Group(s)	06/15/2
Logging	Collection 0 Sub-Group(s)	06/15/2

Click "Create Sub Group"

The screenshot shows a 'Manage Records' page with a yellow header bar. Below the header, there is a breadcrumb navigation: 'Shelton Historical Society > Historic Photos > Logging'. A red rectangular box highlights the 'Create Sub Group' button, which is located in a dark blue bar below the breadcrumb. To the right of the 'Create Sub Group' button is another button labeled 'Assignment'. Below these buttons is a dropdown menu 'Show 100 entries'. The main content area has a table with one visible row, labeled 'Title'. At the bottom of the content area, it says 'Showing 0 to 0 of 0 entries'.

A popup will appear where you can enter the name of the Sub Group.

Click on a Sub Group name to upload records to the Sub Group, or to create additional Sub Groups within the Sub Group

Manage Records

Shelton Historical Society > Historic Photos > Logging

Create Sub Group Assignment

Show 100 entries

Title
Loggers
Trains

Showing 1 to 2 of 2 entries

Click “Add Record” to upload a record to the Sub Group you are in

Manage Records

Shelton Historical Society > Historic Photos > Logging

Create Sub Group Add Record Assignment

Show 100 entries

Title
-------

Showing 0 to 0 of 0 entries

Note: You can also create additional Sub Groups within a Sub Group by clicking the “Create Sub Group” button.

#### Step 4: Upload a Record

The Add Record page is split into three sections.

- On the left side is where you can see where this record is going to be uploaded as well as mark additional Sub Groups where you want this record to be uploaded.
- The middle section is where you will enter all of the information about this record

- The right side is where you can add additional fields to the middle section by clicking "Add" next to one of the fields (you can also create your own custom fields that will appear on the right side. That feature will be covered later in this document)

**Add Record**

You Are Creating A Record In: Trains

**Step 1: About Your Record**

Record Name:  Item Title:   Same as Record Name

Visible To Public?: Yes  No  If "Yes," then the record can be seen by public users.

Private?: No  Private records are not published (anyone with a direct link can view this record)

Perform OCR?: No  If selected, system will submit files for OCR processing

Tags:  Words or phrases separated by commas

**Step 2: Designate Your Fields**

Custom Template:

**Step 3: Define Record Characteristics**

Create Individual records for each file (all designated and pre-filled fields will appear in each record)  
 Use Record Name with Iteration numbers  
 Use the original file name as the Record Name for each record

Attach multiple files to this single record  
 Use Item Title with Iteration numbers  
 Use original file names for the Item Title

**Step 4: Attach Files**

Upload:  No file chosen

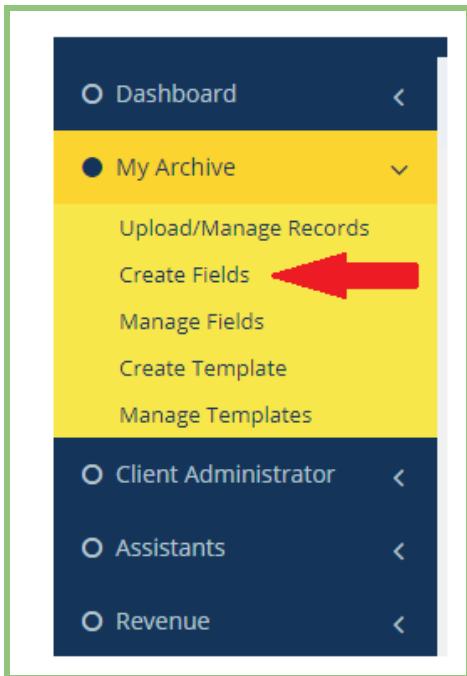
URL's For This Record:

**Traditional Fields**

Additional Info	<input type="button" value="Add"/>	<input type="button" value="Remove"/>
Creator	<input type="button" value="Add"/>	<input type="button" value="Remove"/>
Date	<input type="button" value="Add"/>	<input type="button" value="Remove"/>
Description	<input type="button" value="Add"/>	<input type="button" value="Remove"/>
Location	<input type="button" value="Add"/>	<input type="button" value="Remove"/>

#### Step 4: Create Custom Field

Click “Create Fields” on the left side



Use the “Field Owner” drop down to indicate if you want the field to appear for your whole archive or only within certain Sub Groups

The image shows a form titled "Shelton Historical Society". It contains four input fields: "Field Owner" (set to "Shelton Historical Society" with a red arrow pointing to the dropdown arrow), "Field Name" (set to "Text input"), "Field Type" (set to "- Select -"), and "Field Display Width" (set to "Text input"). Below these fields is a note: "Edit to change the size of the field on the screen". At the bottom are two buttons: "Add Field" (dark blue) and "Clear Field" (orange). The entire form is enclosed in a green rectangular border.

Enter the field name

Shelton Historical Society

Field Owner:	Shelton Historical Society
Field Name :	Text input
Field Type:	- Select -
Field Display Width :	Text input

Edit to change the size of the field on the screen

Add Field    Clear Field



Select the type of field you are creating

Shelton Historical Society

Field Owner:	Shelton Historical Society
Field Name :	Text input
Field Type:	- Select -
Field Display Width :	Text input

Edit to change the size of the field on the screen

Add Field    Clear Field



Enter the Field Display Width (This will adjust how large the field appears on your upload form.)  
**If unsure, enter: 100**

Shelton Historical Society

Field Owner:	Shelton Historical Society
Field Name :	Text input
Field Type:	Short Text, Up To 255 Characters
Field Display Width :	100

Edit to change the size of the field on the screen

**Add Field**   **Clear Field**



Click "Add Field"

Shelton Historical Society

Field Owner:	Shelton Historical Society
Field Name :	Caption
Field Type:	Short Text, Up To 255 Characters
Field Display Width :	100

Edit to change the size of the field on the screen

**Add Field**   **Clear Field**



Your field will now appear on the right side of the Add Record form

You Are Creating A Record In: Loggers

**Step 1: About Your Record**

Record Name:  Item Title:   Same as Record Name

Visible To Public?: Yes If 'Yes', then the record can be seen by public users.

Private?: No Private records are not published (anyone with a direct link can view this record)

Perform OCR?: No If selected, system will submit files for OCR processing

Tags:  Words or phrases separated by commas

**Step 2: Designate Your Fields**

Custom Template: -- SELECT A CUSTOM TEMPLATE --

**Step 3: Define Record Characteristics**

Create individual records for each file (all designated and pre-filled fields will appear in each record)

**Traditional Fields**

- Additional Info
- Creator
- Date
- Description
- Location

**Custom Fields For Archive Group Shelton Historical Society**

- Caption

You can add your custom field to any record by clicking the “Add” button when initially creating a record or while editing a record

You Are Creating A Record In: Loggers

**Step 1: About Your Record**

Record Name:  Item Title:   Same as Record Name

Visible To Public?: Yes If 'Yes', then the record can be seen by public users.

Private?: No Private records are not published (anyone with a direct link can view this record)

Perform OCR?: No If selected, system will submit files for OCR processing

Tags:  Words or phrases separated by commas

**Step 2: Designate Your Fields**

Custom Template: -- SELECT A CUSTOM TEMPLATE --

**Step 3: Define Record Characteristics**

Create individual records for each file (all designated and pre-filled fields will appear in each record)

**Traditional Fields**

- Additional Info
- Creator
- Date
- Description
- Location

**Custom Fields For Archive Group Shelton Historical Society**

- Caption

You Are Creating A Record In: Loggers

**Step 1: About Your Record**

Record Name:  Item Title:   Same as Record Name

Visible To Public?: Yes  If Yes, then the record can be seen by public users.

Private?: No  Private records are not published (anyone with a direct link can view this record)

Perform OCR?: No  If selected, system will submit files for OCR processing

Tags:  Words or phrases separated by commas

**Step 2: Designate Your Fields**

Custom Template:  Use This Custom Template

**Step 3: Define Record Characteristics**

Create individual records for each file (all documents and non-filled fields will appear in each record)

**Traditional Fields**

Additional Info	<input type="button" value="Add"/>	<input type="button" value="Remove"/>
Creator	<input type="button" value="Add"/>	<input type="button" value="Remove"/>
Date	<input type="button" value="Add"/>	<input type="button" value="Remove"/>
Description	<input type="button" value="Add"/>	<input type="button" value="Remove"/>
Location	<input type="button" value="Add"/>	<input type="button" value="Remove"/>

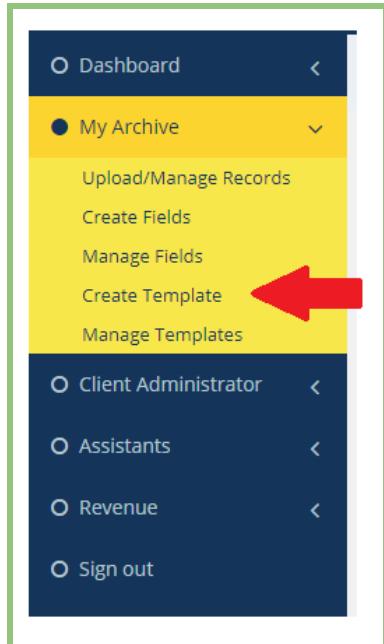
**Custom Fields For Archive Group Shelton Historical Society**

Caption	<input type="button" value="Add"/>	<input type="button" value="Remove"/>
---------	------------------------------------	---------------------------------------

You can also remove a custom field you added by clicking the red “Remove” button on the right side of the page.

## Step 5 Create Custom Templates

Click “Create Template” on the left side



Select a field from the “Template Field” section, then click “Add Field”

Create Templates

Archive : Shelton Historical Society

Template Field :

- ====Traditional Fields=====
- Additional Info
- Creator
- Date
- Description
- Location
- ====Shelton Historical Society=====
- Caption

Template Name : Text input

Fields On Template : -- NO FIELDS SELECTED --

Add Field Remove Field

Add Template Clear

Enter a name for your custom template on the right side

Create Templates

Archive : Shelton Historical Society

Template Field :

- ====Traditional Fields=====
- Creator
- Date
- Location
- ====Shelton Historical Society=====
- Caption

Template Name : Text input

Fields On Template : Additional Info  
Caption  
Description

Add Field Remove Field

Add Template Clear

You can change the order of the fields by selecting a field in the “Fields on Template” section, then using the up and down arrows to the right

Create Templates

Archive : Shelton Historical Society

Template Field :

- ====Traditional Fields=====
- Additional Info
- Creator
- Date
- Description
- Location
- ====Shelton Historical Society=====
- Caption

Template Name : Text input

Fields On Template : Additional Info  
Caption  
Description

Add Field Remove Field

Add Template Clear

Click “Add Template” to save your custom template

The screenshot shows the 'Create Templates' interface. On the left, under 'Template Field', there is a list of 'Traditional Fields': Creator, Date, Location, and a section for 'Shelton Historical Society'. In the center, there are buttons for 'Add Field' and 'Remove Field'. To the right, the 'Template Name' is set to 'My Historic Photos Template', and the 'Fields On Template' list includes 'Additional Info', 'Caption', and 'Description'. At the bottom, there is a red arrow pointing to the 'Add Template' button.

You will now see your custom template on the Add Record page in the “Custom Template” drop down in Step 2

The screenshot shows the 'Add Record' page. On the left, there is a sidebar with categories like 'Shelton Historical Society', 'Historic+Documents', 'Historic+Events', 'Historic+Photos', 'Downtown+Buildings', 'Events', 'Logging', 'Loggers', and 'Trains'. The 'Historic Photos > Logging > Loggers' category is selected. In the main area, 'Step 3: Define Record Characteristics' is shown, with a dropdown menu for 'Custom Template' containing 'My Historic Photos Template' (which is highlighted with a red arrow). Below the dropdown is a 'Use This Custom Template' button.

After you select your custom template from the drop down, click the “Use This Custom Template” button

The screenshot shows the 'Add Record' page again. The 'Custom Template' dropdown is set to 'My Historic Photos Template', and the 'Use This Custom Template' button is highlighted with a red arrow. The rest of the page includes the 'Step 1: About Your Record' and 'Step 2: Designate Your Fields' sections, along with a sidebar for 'Traditional Fields' and 'Custom Fields For Archive Group Shelton Historical Society'.

You will see the custom fields that you included in the template appear on the upload form

**Step 2: Designate Your Fields**

Visible To Public?: Yes      If 'Yes', then the record can be seen by public users.

Private?: No      Private records are not published (anyone with a direct link can view this record)

Perform OCR?: No      If selected, system will submit files for OCR processing

Tags: Words or phrases separated by commas

**Step 3: Define Record Characteristics**

Custom Template: My Historic Photos Template      Use This Custom Template

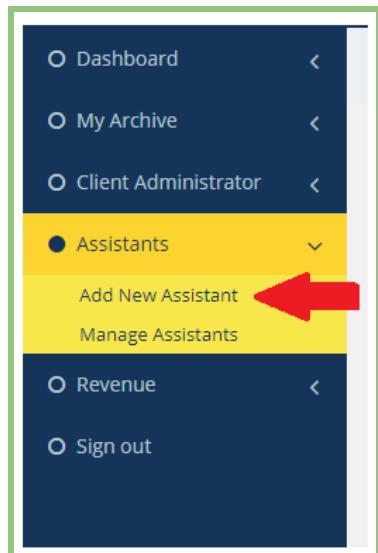
Additional Info

Caption

Description

## Step 6: Create Assistant Accounts and Assign Records

Click “Add New Assistant” on the left side under the “Assistants” section



Select the Archive you want the Assistant to be related to. If you select your top level Archive, you will be able to assign any Sub Group within your whole archive to this assistant. If you

select one of your archives listed in the drop down, you will only be able to assign the assistant to Sub Groups within that specific archive.

Shelton Historical Society

Archive :	<input type="text" value="Shelton Historical Society"/> 	
User Login :	<input type="text" value="Login username"/>	
User Email :	<input type="text" value="Email Id"/>	
<input type="button" value="Add Assistant"/> <input type="button" value="Clear Form"/>		

Create a username

Shelton Historical Society

Archive :	<input type="text" value="Shelton Historical Society"/> 	
User Login :	<input type="text" value="Login username"/>	
User Email :	<input type="text" value="Email Id"/>	
<input type="button" value="Add Assistant"/> <input type="button" value="Clear Form"/>		

Enter their email address

Shelton Historical Society

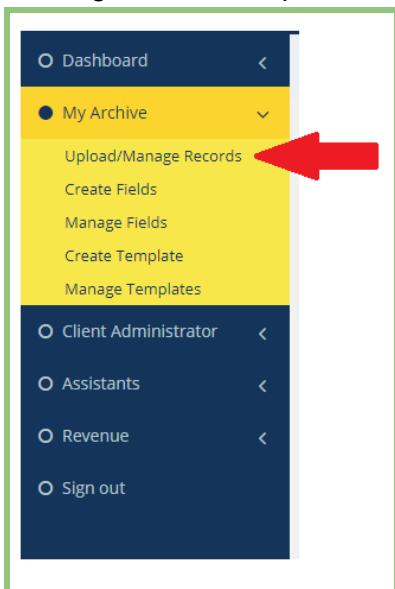
Archive :	<input type="text" value="Shelton Historical Society"/> 	
User Login :	<input type="text" value="Login username"/>	
User Email :	<input type="text" value="Email Id"/>	
<input type="button" value="Add Assistant"/> <input type="button" value="Clear Form"/>		

Click "Add Assistant"

A screenshot of a web form titled "Add Assistant". The form has three input fields: "Archive:" containing "Shelton Historical Society", "User Login:" containing "Jim\_assist\_SHS", and "User Email:" containing "jim@smalltownpapers.com". Below the inputs are two buttons: "Add Assistant" (blue) and "Clear Form" (red). A large red arrow points to the "Add Assistant" button.

An email will be sent to the email address you entered. The assistant will need to click the link in that email to validate their account and set their password.

To assign a Sub Group to an Assistant, click on “Upload/Manage Records”



Navigate to the Sub Group you want to assign to the assistant and check the box on the left side

Title	Type	Created
<input type="checkbox"/> Loggers	Sub-Group 1 Rec(s)	06/15/2018 03:13:36 PM
<input type="checkbox"/> Trains	Sub-Group 0 Rec(s)	06/15/2018 03:13:23 PM

Click the “Assignments” button

Title	Type
<input checked="" type="checkbox"/> Loggers	Sub-Group 1 Rec(s)
<input type="checkbox"/> Trains	Sub-Group 0 Rec(s)

Select the Assistant you want to assign the Sub Group to

Add Assignment	X
Select Assistant	Cody_assist_HE_assist_SHS
Sub Group Name	<input checked="" type="checkbox"/> Loggers
<b>Assign</b> <b>Cancel</b>	

Click “Assign”

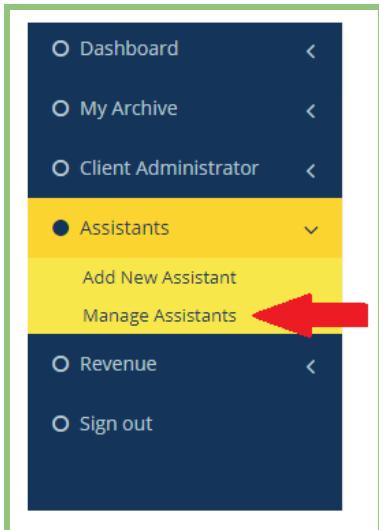
Add Assignment

Select Assistant: Cody\_assist\_HE\_assist\_SHS

Sub Group Name: Loggers

**Assign** **Cancel**

To manage your assistant accounts, click “Manage Assistants” in the menu on the left



You can edit an account by clicking the pencil icon on the right side

Shelton Historical Society			Actions
User Login	User Title		Actions
Cody_assist_HE_assist_SHS	Cody_assist_HE_assist_SHS		
jim_assist_SHS	jim_assist_SHS		

You can view what Sub Groups are assigned to an Assistant by clicking the Manage Assistant icon shown below

User Login	User Title	Actions
Cody_assist_HE_assist_SHS	Cody_assist_HE_assist_SHS	
Jim_assist_SHS	Jim_assist_SHS	

A popup will appear showing what Sub Groups are currently assigned to the Assistant account

Managing Assignment for Assistant: Jim\_assist\_SHS

Available Sub Groups

- Shelton Historical Society
- + Historic+Documents
- + Historic+Events
- + Historic+Photos

Assigned Sub Groups

Loggers

Assign
Unassign

You can also assign multiple Sub Groups to an Assistant using this window. Select the Sub Groups you want to assign to the Assistant, then click the blue “Assign” button.

\*NOTE: A Sub Group must contain at least one Record before you can assign it to an Assistant.

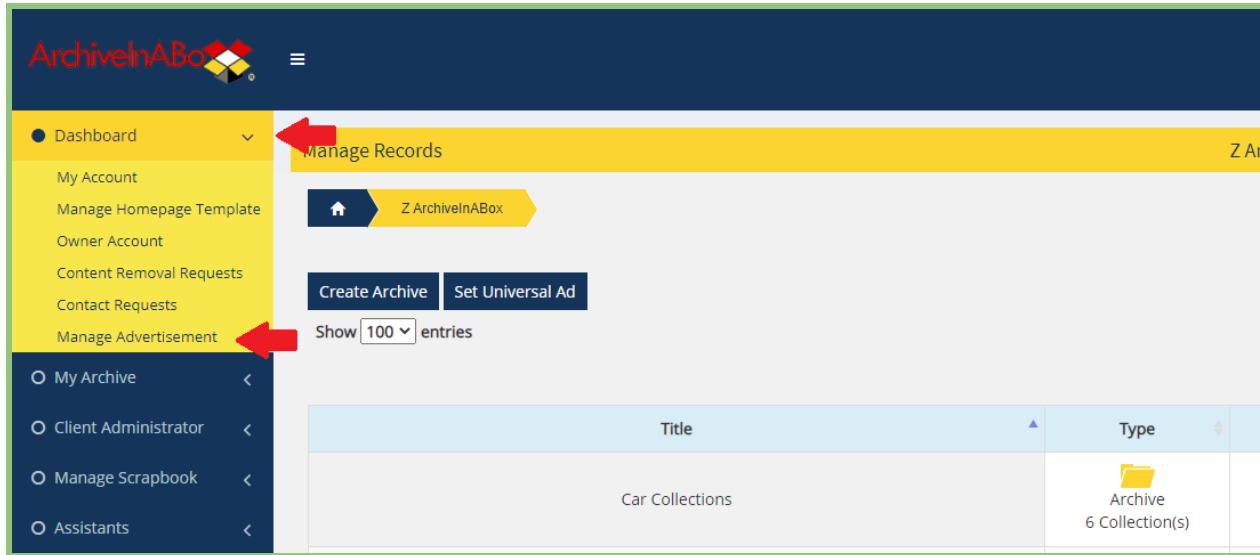
## Advertising Manager

With Advertising Manager, you can sell and manage your own advertising/sponsorship program. Sell your own local ads and keep all the money.

Showcase your local patrons, sponsors and supporters by publishing their display ad (300x250) across your entire archive or in specific collections or subgroups. Raise money to help support your organization’s mission to preserve and make accessible!

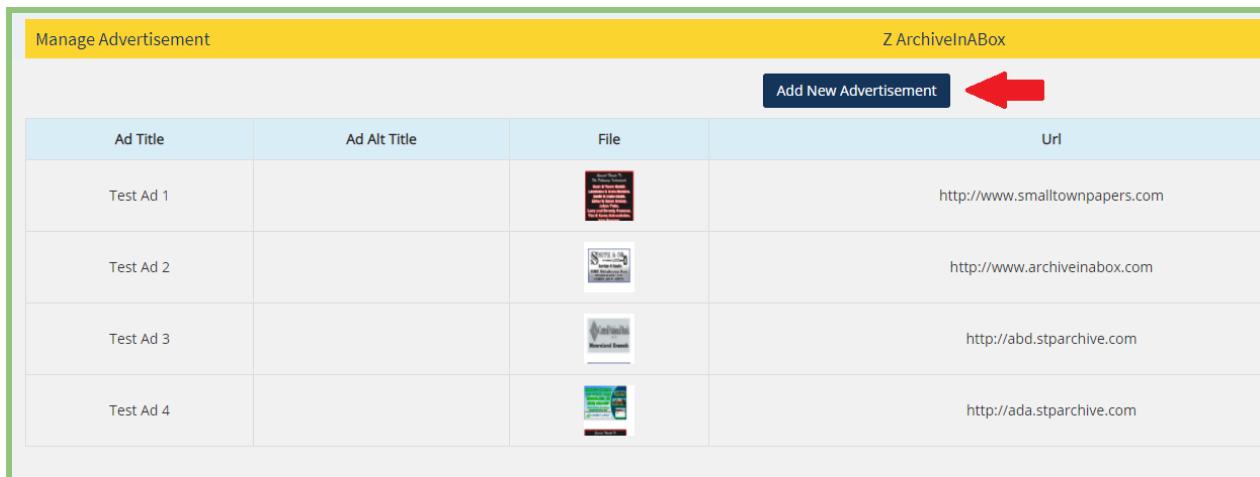
Family patrons can sponsor individual collections.

To manage and upload advertisements, click “Manage Advertisements” in the menu on the left side of the page



The screenshot shows the ArchivelnABox dashboard. On the left, there is a sidebar with a yellow header "Dashboard" and a blue header "My Account". Below these are several menu items: "Manage Homepage Template", "Owner Account", "Content Removal Requests", "Contact Requests", and "Manage Advertisement". The "Manage Advertisement" item is highlighted with a red arrow. The main content area has a yellow header "Manage Records" and a blue header "Z ArchivelnABox". It contains a "Create Archive" button, a "Set Universal Ad" button, and a dropdown menu "Show 100 entries". Below this is a table with columns "Title" and "Type". A single row is visible, titled "Car Collections" and categorized as an "Archive" type with "6 Collection(s)".

Click “Add New Advertisement” to upload a new ad



The screenshot shows the "Manage Advertisement" page. At the top, it says "Manage Advertisement" and "Z ArchivelnABox". In the center, there is a table with four columns: "Ad Title", "Ad Alt Title", "File", and "Url". Four rows are listed: "Test Ad 1" with a file thumbnail and URL "http://www.smalltownpapers.com"; "Test Ad 2" with a file thumbnail and URL "http://www.archiveinabox.com"; "Test Ad 3" with a file thumbnail and URL "http://abd.starchive.com"; and "Test Ad 4" with a file thumbnail and URL "http://ada.starchive.com". At the top right of the table area, there is a blue button labeled "Add New Advertisement" with a red arrow pointing to it.

Fill out the form, then click “Submit”

Ad Title	Ad Alt Title	File	Url	Action
Test Ad 1			http://www.smalltownpapers.com	

Advertisement Title is the title of your advertisement.

Ad Alt Title is a secondary or a sub title that you can use but is not required. For example, if you have multiple ads from the same vendor, you can use the Advertisement Title to list the vendor name, then use the Ad Alt Title to list the name of the advertisement.

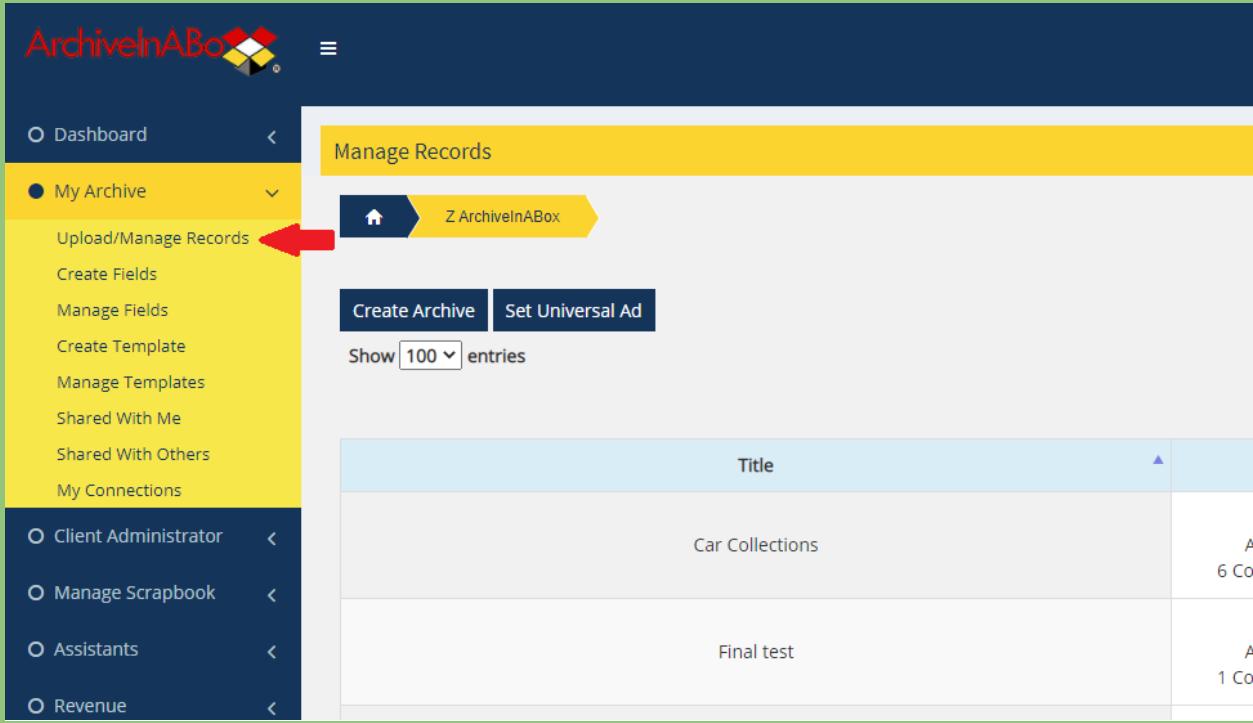
Advertisement Link URL is where you can paste a URL link to link the advertisement to another site, for example, the vendor's site. If you put a link in the Advertisement Link URL field, when a user clicks on the advertisement, they will be taken to the URL you entered.

Click Choose File to select the advertisement image you want to upload. The image must be at least 300x250 pixels.

After uploading an advertisement, you can edit or delete the advertisement by clicking the icons in the Actions column on the right side

Ad Title	Ad Alt Title	File	Url	Action
Test Ad 1			http://www.smalltownpapers.com	
Test Ad 2			http://www.archiveinabox.com	
Test Ad 3			http://abd.starchive.com	
Test Ad 4				

To assign an advertisement to an archive, collection, or sub group, click Upload/Manage Records

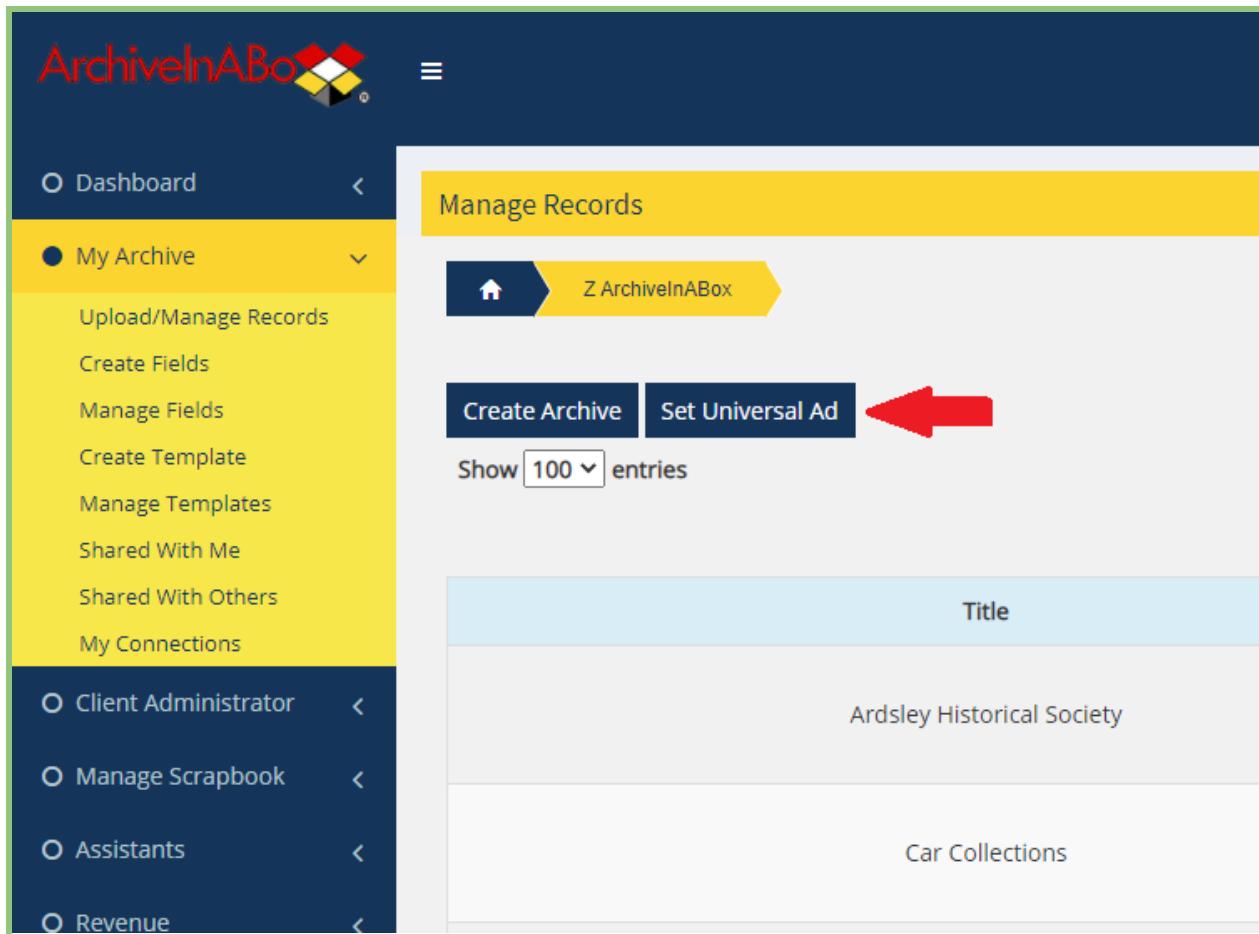


The screenshot shows the ArchivelnABox application interface. On the left, there is a vertical sidebar with a dark blue header and a yellow footer. The sidebar contains several menu items under 'My Archive': 'Upload/Manage Records' (which has a red arrow pointing to it), 'Create Fields', 'Manage Fields', 'Create Template', 'Manage Templates', 'Shared With Me', 'Shared With Others', and 'My Connections'. Below these are sections for 'Client Administrator', 'Manage Scrapbook', 'Assistants', and 'Revenue'. The main area is titled 'Manage Records' and features a search bar with 'Show 100 entries'. It includes buttons for 'Create Archive' and 'Set Universal Ad'. Below the search bar is a table with two rows. The first row has a single column labeled 'Title' containing 'Car Collections'. The second row has a single column labeled 'Final test'. To the right of the table, there are some small, partially visible text elements.

There are two ways to assign ads to your archives.

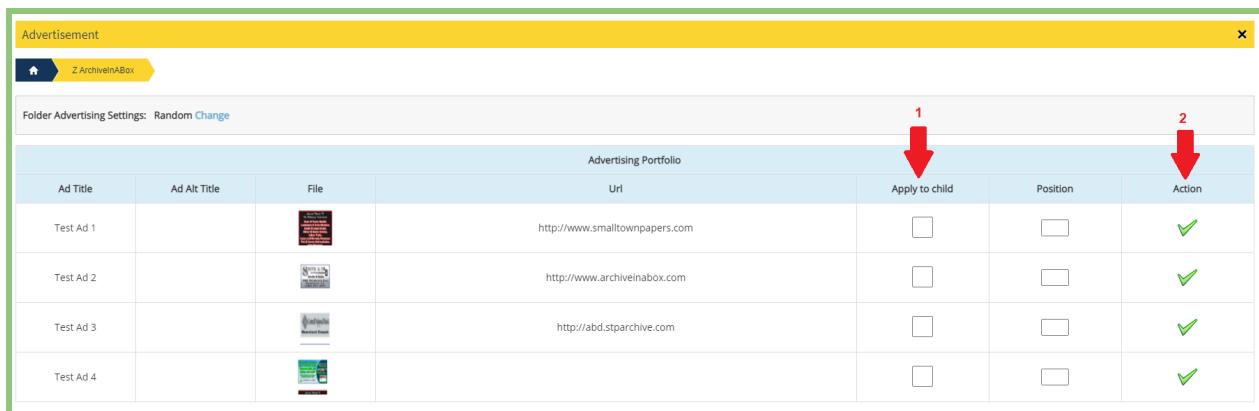
1. Universal Ads (these ads are assigned to your whole archive)
2. Ads assigned to specific folders (these ads will only appear within the specific Archive, Collection, or Sub Group that you assign them to)

To assign a Universal Ad, click the “Set Universal Ad” button on the Upload/Manage Records page



The screenshot shows the ArchivelnABox interface. On the left, there's a sidebar with sections like 'Dashboard', 'My Archive' (which is currently selected), 'Client Administrator', 'Manage Scrapbook', 'Assistants', and 'Revenue'. The main area is titled 'Manage Records' and contains a breadcrumb trail: 'Home > Z ArchivelnABox'. Below the breadcrumb are two buttons: 'Create Archive' and 'Set Universal Ad' (which has a red arrow pointing to it). There's also a dropdown for 'Show 100 entries'. The main content area displays a table with two rows. The first row has a 'Title' column containing 'Ardsley Historical Society'. The second row has a 'Title' column containing 'Car Collections'.

Check the box in the “Apply to Child” column, then click the green check mark in the “Actions” column to set the ad as a Universal Ad. You can also set the position of the ad in the “Position” column. For example, if you have an ad that you always want to display first you can set the position to 1.



This screenshot shows the 'Advertisement' settings page. At the top, it says 'Advertisement' and 'Folder Advertising Settings: Random Change'. Below that is a table titled 'Advertising Portfolio'. The columns are 'Ad Title', 'Ad Alt Title', 'File', 'Url', 'Apply to child' (with a red arrow pointing to it), 'Position', and 'Action' (with another red arrow pointing to it). There are four rows in the table, each representing an ad: 'Test Ad 1', 'Test Ad 2', 'Test Ad 3', and 'Test Ad 4'. Each row has a small thumbnail image in the 'File' column and a URL in the 'Url' column.

To remove a Universal Ad that was previously set, click the red X in the Actions column

Advertising Portfolio						
Ad Title	Ad Alt Title	File	Url	Apply to child	Position	Action
Test Ad 3			http://abd.starchive.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Test Ad 4				<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Advertisements applied to this folder						
Ad Title	Ad Alt Title	File	Url	Apply to child	Position	Action
Test Ad 1			http://www.smalltownpapers.com	<input checked="" type="checkbox"/>	<input type="checkbox"/> 1	<input checked="" type="checkbox"/>
Test Ad 2			http://www.archiveinabox.com	<input checked="" type="checkbox"/>	<input type="checkbox"/> 1	<input checked="" type="checkbox"/>

To set an ad for a specific Archive, Collection, or Sub Group, navigate to the folder that you want to assign the ad to, then click on the advertisements button under the Actions column on the right side

Title	Type	Created	Date Claimed	Actions
Historic Photos	Collection 2 Sub-Group(s)	06/14/2018 11:24:05 AM	NA	
Maps	Collection 1 Sub-Group(s)	06/14/2018 11:23:45 AM	NA	

Showing 1 to 2 of 2 entries

Date Claimed	Actions
NA	
NA	

If there are any ads that were set at a higher level than the level you are currently on, you will see those in the bottom of the popup that appears. For example, in the screenshot below, I had already assigned a Universal Ad to my archive. That Universal Ad is shown in the **Advertisements Applied from Parent Folder(s)** section at the bottom of the popup in the screenshot below.

In this popup, check the box in the **Apply to Child** column, then click the green check mark on the right side to assign an advertisement to this folder.

The screenshot shows the 'Advertisement' settings dialog. At the top, it says 'Folder Advertising Settings: Random Change'. Below this are two tables:

- Advertising Portfolio:** This table lists four ads (Test Ad 2, Test Ad 3, Test Ad 4) with columns for Ad Title, Ad Alt Title, File, Url, Apply to child (checkbox), Position (input field), and Action (green checkmark). Red arrows labeled 1. and 2. point to the 'Apply to child' checkbox and the green checkmark in the 'Action' column respectively.
- Advertisements applied from parent folder(s):** This table lists one ad (Test Ad 1) with columns for Ad Title, Ad Alt Title, File, Url, Apply to child (checkbox checked), Position (input field 1), and Action.

Once again, you can click the red X to remove an ad from a folder.

The screenshot shows the 'Advertisement' settings dialog. It includes the same two tables as the previous screenshot, but with a red arrow pointing to the red 'X' icon in the 'Action' column for Test Ad 2 in the 'Advertisements applied from parent folder(s)' table, indicating it has been removed.

# Watermark Manager

With the Watermark Manager feature you can set a default watermark that will appear on your whole archive. Additionally, you can set custom watermarks for specific folders (Archives, Collections, and Sub Groups) or even specific records.

To set the default watermark text which will automatically be applied to your archive as a whole, go to the “Manage Homepage Template” page

The screenshot shows the ArchivelnABox dashboard. On the left, there's a sidebar with various menu items. One item, "Manage Homepage Template", is highlighted with a large red arrow pointing towards it from the left. The main content area is titled "Manage Records". It features a "Create Archive" button, a "Set Universal Ad" button, and a dropdown menu set to "Show 100 entries". Below these are two sections: one labeled "Title" with the text "Ardsley Historical Society" and another labeled "Car Collections".

Click the Contact Information tab

Manage Home Page Template

Basic Information      Contact Information      Images



Historical Society Name : ?	Z ArchiveInABo
Display Name : ?	Text input
Address : ?	Address
About Content : ?	About cont

Enter the watermark text in the Watermark Text field. (30 character limit)

Manage Home Page Template

Basic Information      Contact Information      Images

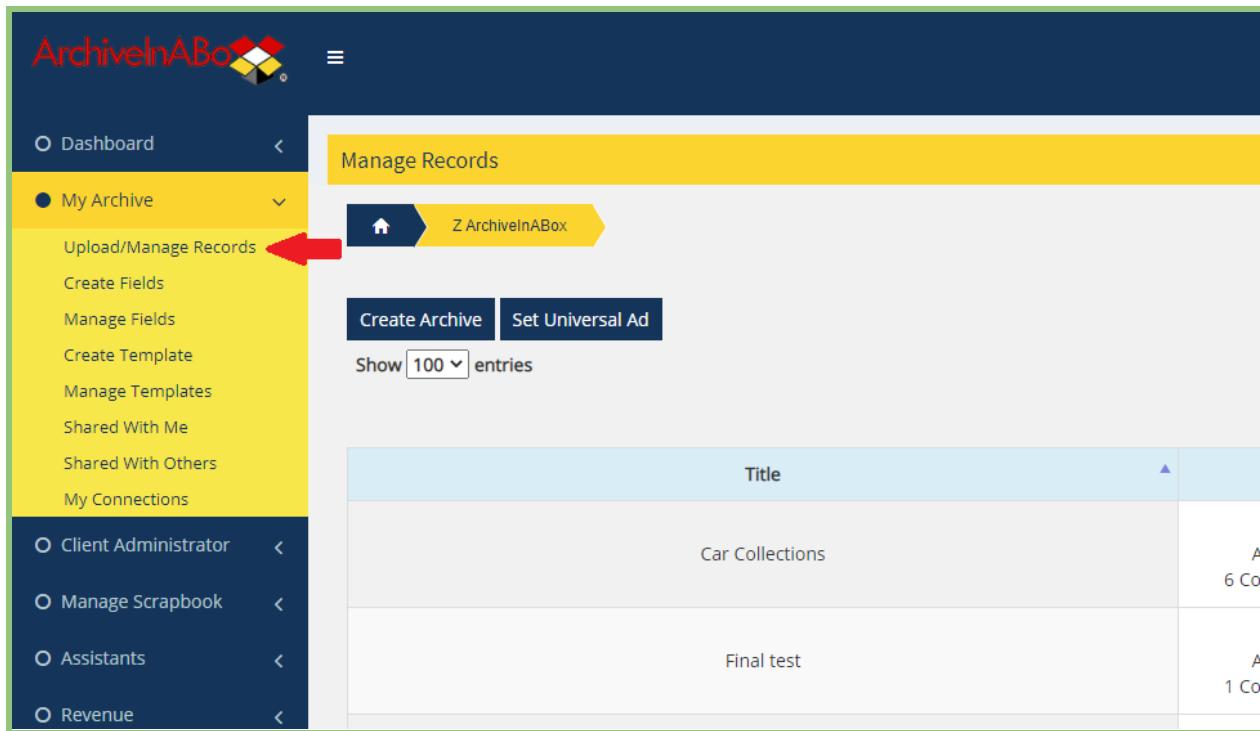
Preferred Time Zone : ?	UTC-8: Pacific Standard Time (PST)
Contact No. : ?	Text input
Website : ?	Text input
Hours : ?	Text input
Watermark Text : ?	Text input
Display State : ?	--Select---
Display County : ?	Text input
Display City : ?	Text input
Display Zip : ?	Text input

**Update**      **Clear Form**



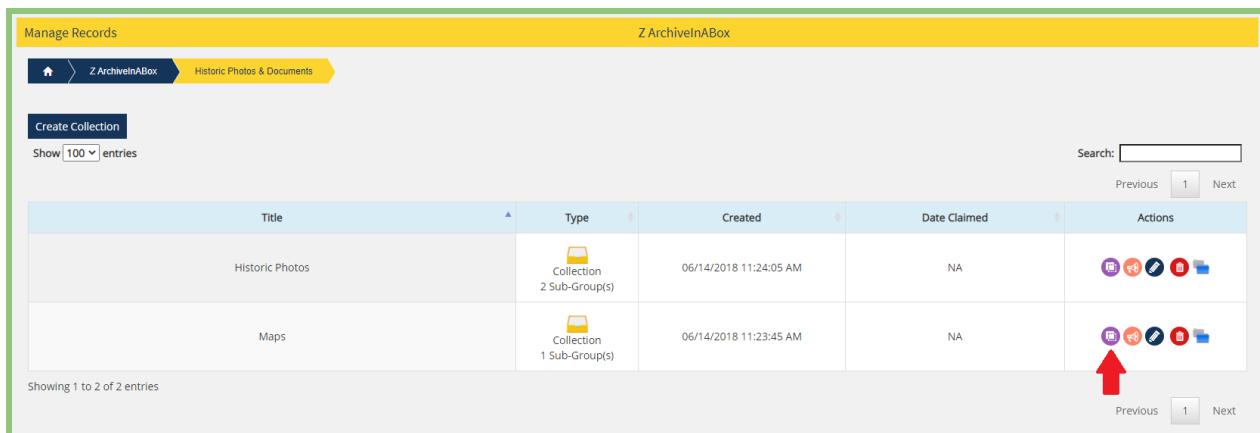
Click Update at the bottom of the page to save the changes

To set the watermark for a specific folder within your archives or a specific record, go to the Upload/Manage Records page

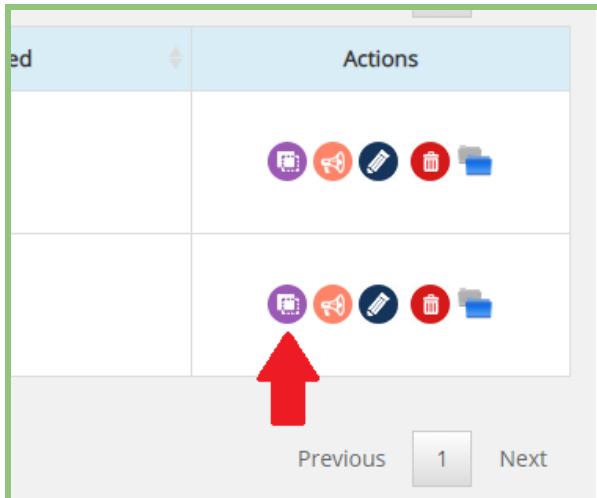


The screenshot shows the ArchivelnABox web application. On the left, there is a vertical sidebar with a yellow header containing 'My Archive' and several other navigation items: 'Create Fields', 'Manage Fields', 'Create Template', 'Manage Templates', 'Shared With Me', 'Shared With Others', 'My Connections', 'Client Administrator', 'Manage Scrapbook', 'Assistants', and 'Revenue'. Below this is a blue header with 'Dashboard' and a back arrow. The main content area has a yellow header 'Manage Records' with a back arrow and a home icon. It contains buttons for 'Create Archive' and 'Set Universal Ad', and a dropdown for 'Show 100 entries'. Below this is a table with a single column 'Title' containing 'Car Collections' and 'Final test'. The right side of the table shows some statistics: '6 Co' and '1 Co'.

Navigate to the folder (Archive, Collection, or Sub Group) or to the record you want to set a custom watermark for and click the Watermark icon on the right side under the Actions column



This screenshot shows the 'Manage Records' page with a yellow header 'Manage Records' and a breadcrumb 'Z ArchivelnABox / Historic Photos & Documents'. It features a 'Create Collection' button and a dropdown for 'Show 100 entries'. The main area is a table with columns: 'Title', 'Type', 'Created', 'Date Claimed', and 'Actions'. There are two entries: 'Historic Photos' (Collection, 2 Sub-Group(s), Created 06/14/2018 11:24:05 AM, Date Claimed NA, Actions: icons for edit, delete, etc.) and 'Maps' (Collection, 1 Sub-Group(s), Created 06/14/2018 11:23:45 AM, Date Claimed NA, Actions: icons for edit, delete, etc.). A red arrow points to the 'Actions' column for the 'Maps' entry, specifically highlighting the watermark icon.



A popup will appear where you can enter the custom watermark for that specific folder or record.

A screenshot of a 'Add Watermark' dialog box. The title bar says 'Add Watermark' and has a close button. The main area has a label 'Archive Watermark Text' and a text input field containing the text 'SmallTownPapers'. At the bottom are two buttons: a dark blue 'Submit' button and a light gray 'Cancel' button.

Enter the text, then click Submit to save the changes.

When you set a watermark for a specific Archive, Collection, or Sub Group, the watermark will be applied to all records within that Archive, Collection or Sub Group including any new uploads within that folder.