

Ameriprise - Organize

<http://ameriprise.organize.cgx.com>

Basic User Guide

What will be covered in this guide:

- Click on the link to go directly to that topic.

- [Login](#)
- [Change password \(after new account setup/lost password\)](#)
- [Navigate through the website](#)
- [Search for a file](#)
- [Expand my view to see more or all of the search results](#)
- [Preview images and additional metadata](#)
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- [Permanently change your default download format](#)
- [Administer Collection](#)
- [Create PDF catalog](#)
- [Email File Send](#)
- [Icon Definitions](#)

To login

1. Go to the site url <http://ameriprise.organize.cgx.com> and enter your username and password. Note that the system is case sensitive.



Welcome to Organize

A login form with a grey background. It contains two input fields: "Username" and "Password", each with a small grey label to its left. Below the fields is a "Submit" button.

To request access to Organize, complete this form ['New User'](#)

Your request will be reviewed within one business day.

To request an account extension, complete this form [Extend Access](#)

To request a login reset, complete this form [Forgot user name/password](#)

Questions? Please contact: OrganizeHelp@ampf.com

To access the Ameriprise brand guidelines, visit: <https://brandcentral.ameriprise.com>


Changing your password (new user setup/lost password)

New User password reset:

- After logging in the first time with your temporary password, Organize will take you to the 'Edit Personal Information' form (see screen shot below).
- Please verify your details and, change the '**password**' and '**security question & answer**' to something known only to you.
- Your password must be at least 8 characters long, contain at least one uppercase, one lowercase, one number, and one special character.
 - **Note: special characters are limited to these options: ["!" , "\$" , "^" , " _" , "-"].**

Edit Personal Information

Please update your personal information below.

| Basic Information | Extended Details |
|--|-------------------------------|
| Language: Classic | Title: |
| First Name: Demo | Department: |
| Middle Name: | Telephone: |
| Last Name: Organize | Company: |
| New Password: ***** | City: Please Enter a City |
| Confirm: ***** | State: |
| Security Question:* | Country: |
| Security Answer: | Download: Uncompressed PC Zip |
| captcha:*  | |
| refresh | |
| ULA:* <input type="checkbox"/> I have read and accepted the user license agreement | |
| Show ULA | |

Help Reset **Submit**

Lost password reset:


- To reset your password, follow the **'Forgot user name/password'** link on the home page.
- Select and enter your registered email or your Organize login id. Enter the captcha and click on submit.



Please fill out the form below to reset your password.

Choose lookup: email login

Email:*

captcha:* 

- System will now confirm your security answer. Check the 'ULA' and click on 'Submit'.



Please fill out the form below to reset your password.

Last Password Change:

Login:

Security Question:



Security Answer:*

ULA:* I have read and accepted the user license agreement

- You will then receive a system generated verification email. After verifying the link, you will receive another email with the most recent password you were using.

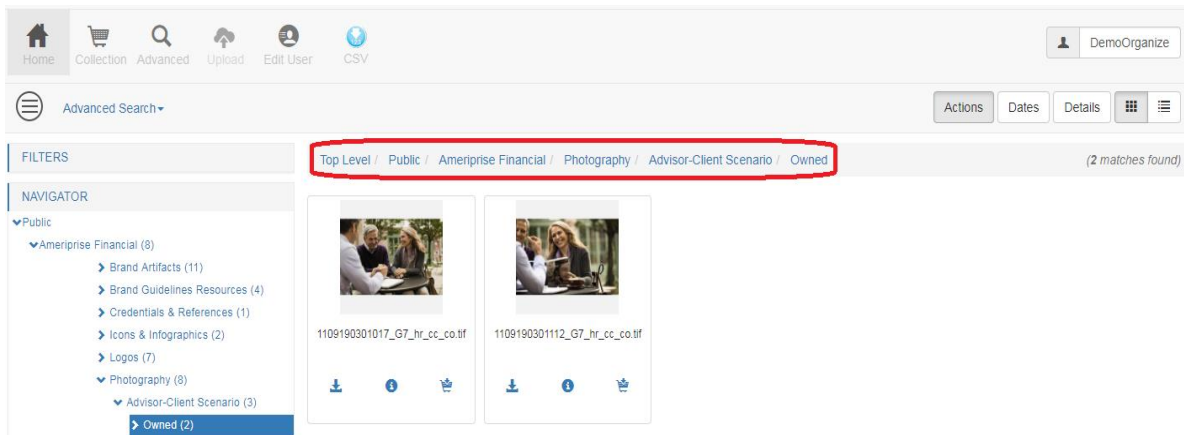
How to navigate through the website

1. Once you have logged in, you will be presented with the directories you have been approved to access. These will appear as a directory tree in the left side of your display (**click on the arrow next to the folder to expand the tree**). The directory name will include a number at the end of it designating how many items live in the 1st level. An item could be a file or a folder.

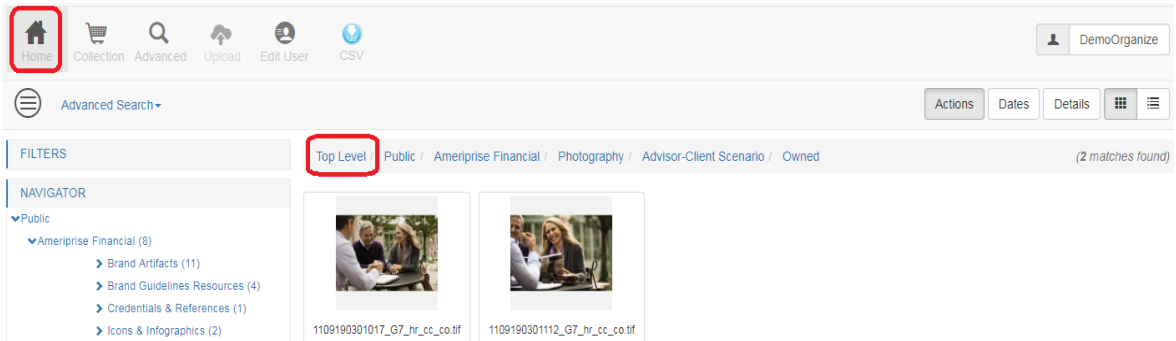
-  Navigator open: Display reflects the directory tree is open in the left side of your display.
-  Navigator closed: Display reflects the directory tree is closed in the left side of your display.

2. Once you select a folder, the file contents of that folder will appear in the main area of your interface with subdirectories appearing in your tree at left.

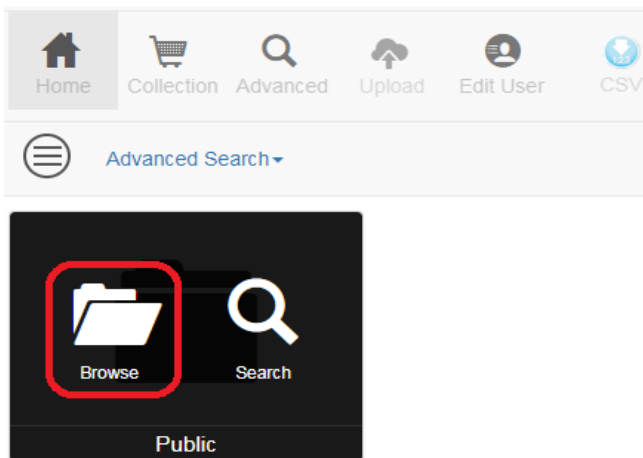
3. As you click deeper into the sub-directories, the breadcrumb of your path will be displayed above the main display area.



4. Clicking on the **Home** icon or **Top Level** option will take you back to the main directory or top level of access of your account.



By clicking on the **Browse** folder option, you will start navigating into the directory and the contents of that directory will be displayed.



How to change your view and control display

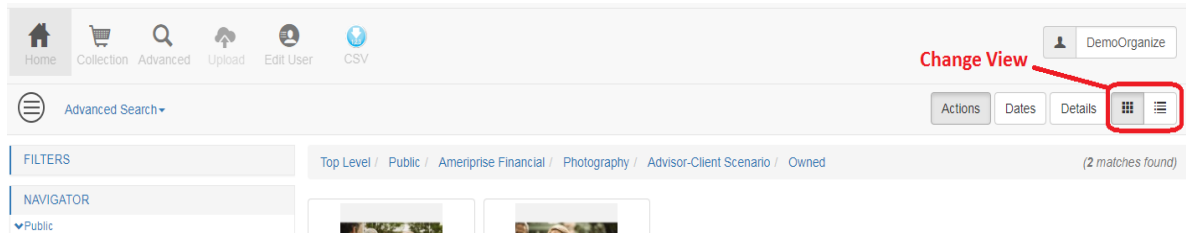
- Turning on the buttons on the top right hand of the screen will change the display of information below the thumbnail of the file.



The screenshot shows a file management interface with two file thumbnails. The top right corner has three buttons: 'Actions', 'Dates', and 'Details', which are highlighted with a red box. Below the thumbnails, there are three red boxes with arrows pointing to specific elements:

- Action icons:** A red box highlights the download, share, and favorite icons for the second file.
- System dates:** A red box highlights the 'Created on', 'Last modified', and 'Last accessed' dates for the second file.
- Meta-data of the file:** A red box highlights the 'Source', 'License Type', 'Expiration Date', and 'Description' for the second file.


- **Actions** Actions button: When this option is turned on, it will display the action icons under the thumbnails of the files.
- **Dates** Dates button: When turned on, it will display the system dates of the files.
- **Details** Details button: When turned on, it will display the meta-data of the files.

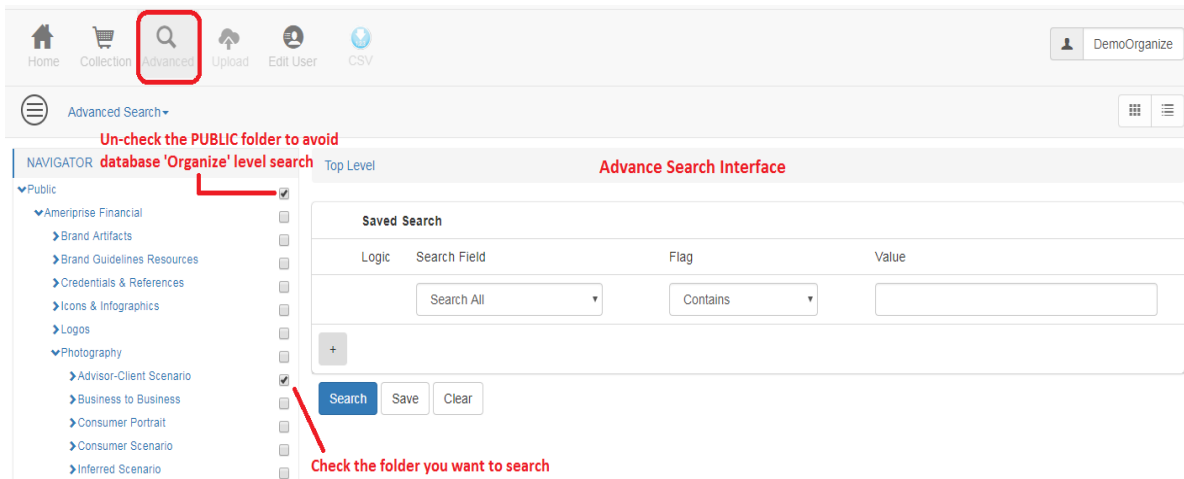
- Using the change view feature can change the way your files are displayed in the main area. This is located in the top right of the main tool bar. There are multiple views that can be used depending on your need and desired detail.



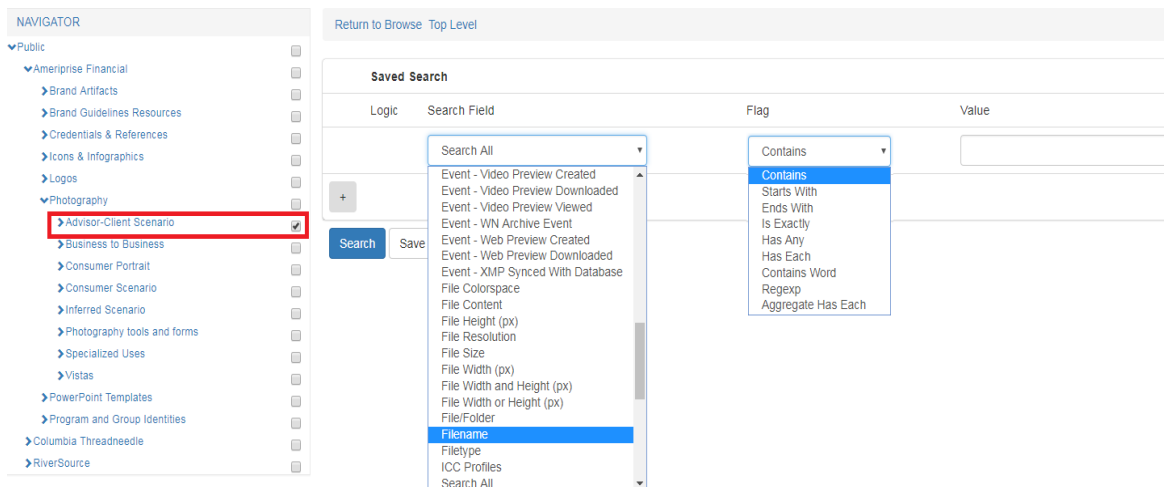
-  Short view – displays file thumbnails with functional icons below the thumbnail.
-  List view – displays files in a column format without thumbnails.


How to search for a file

- 1) To search within a folder on Organize. Click on the search icon  at the top left of the screen. Go to the folder you would like to search and put a check next to it (**uncheck the PUBLIC folder to avoid database 'Organize' level search**).
- 2) This search allows you to start the advanced search interface from within that specific folder.

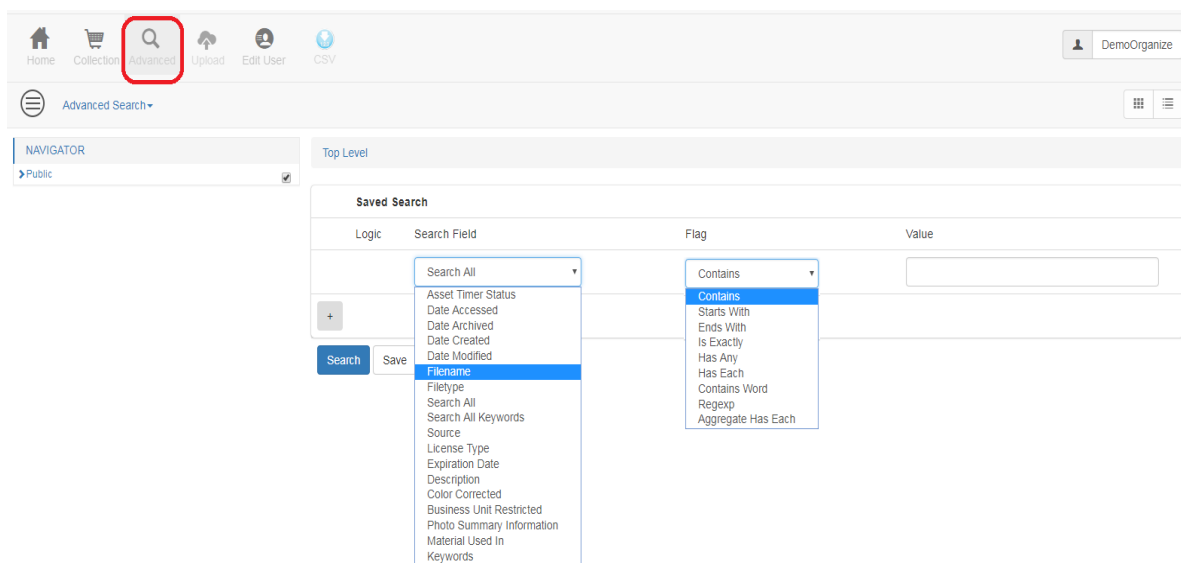


From here we recommend using the **Advanced Options** button where you can designate your search criteria and filter results by adding your required search parameters.



3) If you are not sure about the location of the file on Organize. Click on the search icon  found along the top left side of the screen to perform a database (Organize) level search. This will open your advance search interface.


From your select list you can designate your search criteria and filter results by adding your required search parameters through the **Advanced Options** button.



**** Search TIPS:**

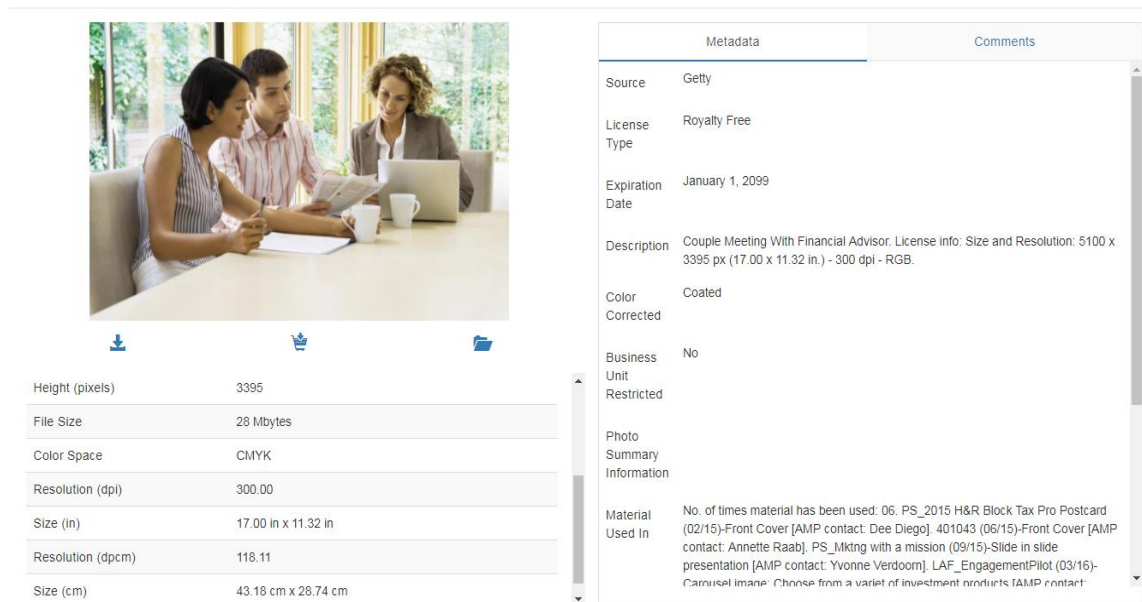
- **DO NOT** use more than one word for each search criteria. Including 'spaces' in your search will cause problems.
- As mentioned you can search the content within PDF, Excel, and Word files, but not compressed (Zip) files.

How to preview images

- To preview images, click on any image thumbnail or click on  icon that you would like to preview. The image will display in the main display area at a larger size.

From here you can view additional information about the file in the 'Metadata' sections on the right including licensing information, expiration dates, and where the material has been used.


77088654_super_G7_hr_cc_co.tif





| | |
|-------------------|---------------------|
| Height (pixels) | 3395 |
| File Size | 28 Mbytes |
| Color Space | CMYK |
| Resolution (dpi) | 300.00 |
| Size (in) | 17.00 in x 11.32 in |
| Resolution (dpcm) | 118.11 |
| Size (cm) | 43.18 cm x 28.74 cm |

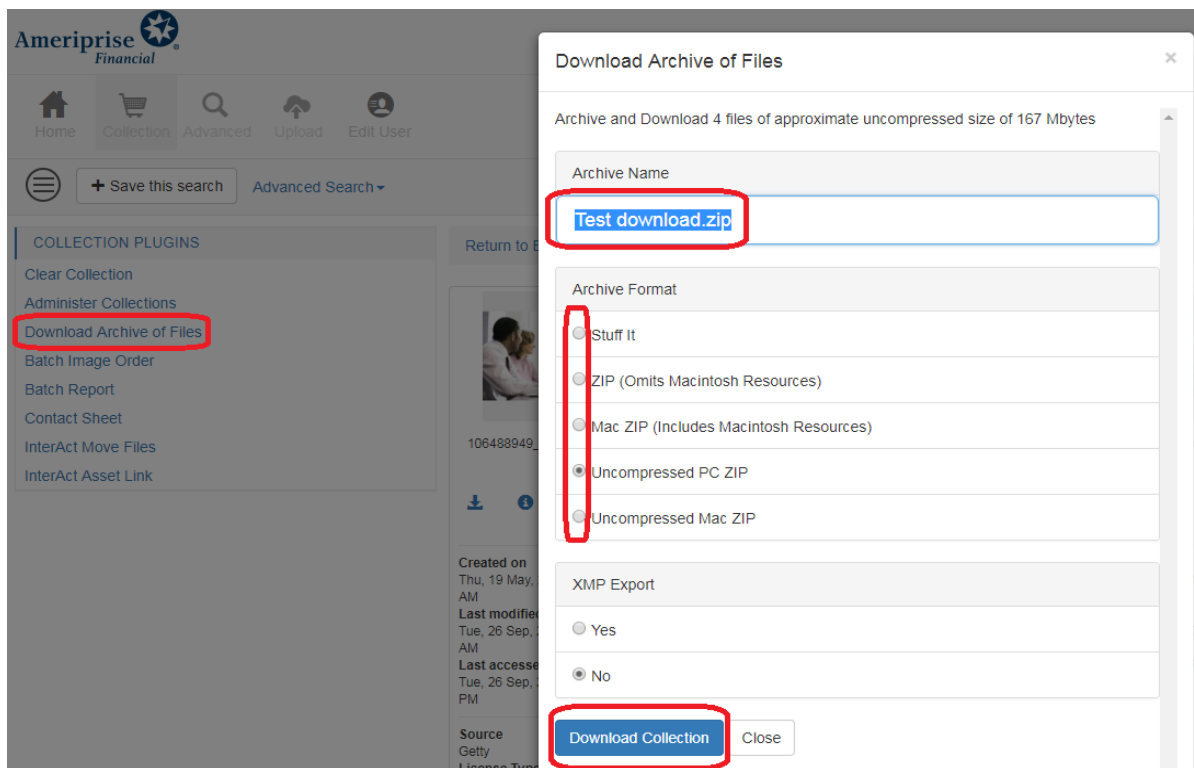
| Metadata | | Comments |
|---------------------------|---|----------|
| Source | Getty | |
| License Type | Royalty Free | |
| Expiration Date | January 1, 2099 | |
| Description | Couple Meeting With Financial Advisor. License info: Size and Resolution: 5100 x 3395 px (17.00 x 11.32 in.) - 300 dpi - RGB. | |
| Color Corrected | Coated | |
| Business Unit Restricted | No | |
| Photo Summary Information | | |
| Material Used In | No. of times material has been used: 06. PS_2015 H&R Block Tax Pro Postcard (02/15)-Front Cover [AMP contact: Dee Diego]. 401043 (06/15)-Front Cover [AMP contact: Annette Raab]. PS_Mking with a mission (09/15)-Slide in slide presentation [AMP contact: Yvonne Verdoorn]. LAF_EngagementPilot (03/16)-Carousel imane Choose from a variety of investment products [AMP contact: | |

How to download a file or multiple files

To download an individual file, select the download icon  below each thumbnail and this will initiate the process to download a compressed file to your local computer.

To download multiple files:


1. Select the shopping cart icon  below each thumbnail you would like to download to add it to the collection.
2. To view your collection, select the Collection icon  in the top horizontal tool bar which will display your collection interface and options.
3. You can now download all the files with one click and name the compressed file by clicking the **Download Archive of Files** link.



4. Name your file and designate the **compression type (archive format)** if you want to change the default and then click **“Download Collection”**.


Permanently change your default download format

To make it a permanent change follow these steps:

- Click on **Edit User** icon  and change the default download preference to whatever is appropriate.
- You may need to log out, and clear your internet browser history for this to take effect.


Edit Personal Information

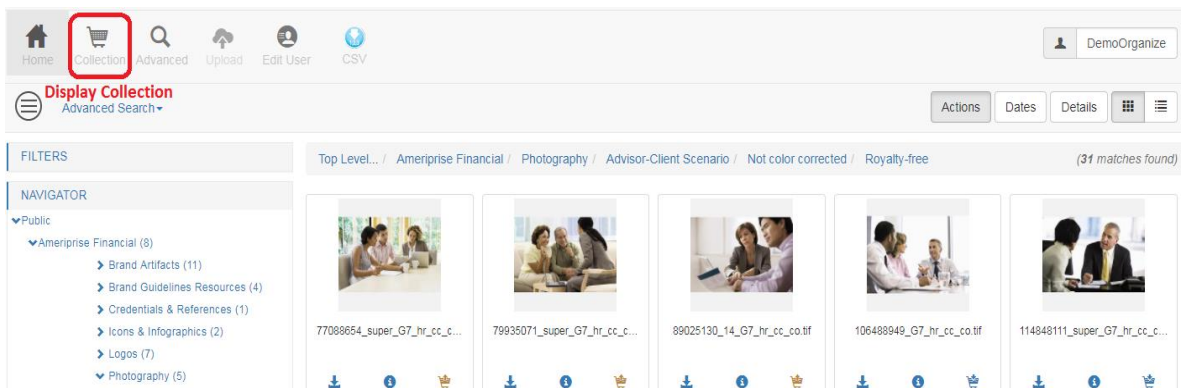
Please update your personal information below.

| Basic Information | Extended Details |
|---|--|
| Language: Classic | Title: |
| First Name: Demo | Department: |
| Middle Name: | Telephone: |
| Last Name: Organize | Company: |
| New Password: | City: Please Enter a City |
| Confirm: | State: |
| Security Question*: | Zip: |
| Security Answer: | Country: |
| captcha*  | Download: Uncompressed PC Zip |
| <input type="button" value="refresh"/> | Stuff It |
| | Mac ZIP (Includes Macintosh Resources) |
| | PC ZIP (Omits Macintosh Resources) |
| | Uncompressed PC Zip |
| | Uncompressed Mac Zip |

ULA* I have read and accepted the user license agreement

How to administer your collection

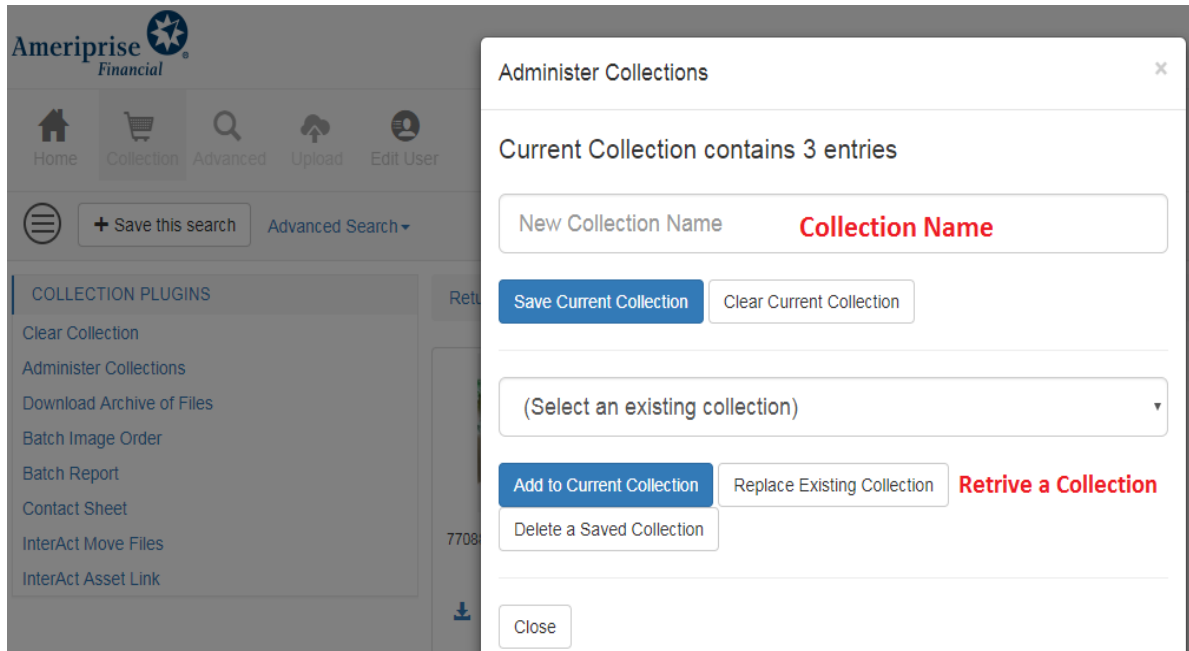
1. Select the file or files you want to save for later retrieval by adding them to your collection .
2. Now select the shopping cart icon in the top horizontal tool bar to display your collection interface and options.



This will display your collection interface and from here you can select your Administer Collection link.



3. This will display the interface to name the collection and retrieve your previously saved collections.

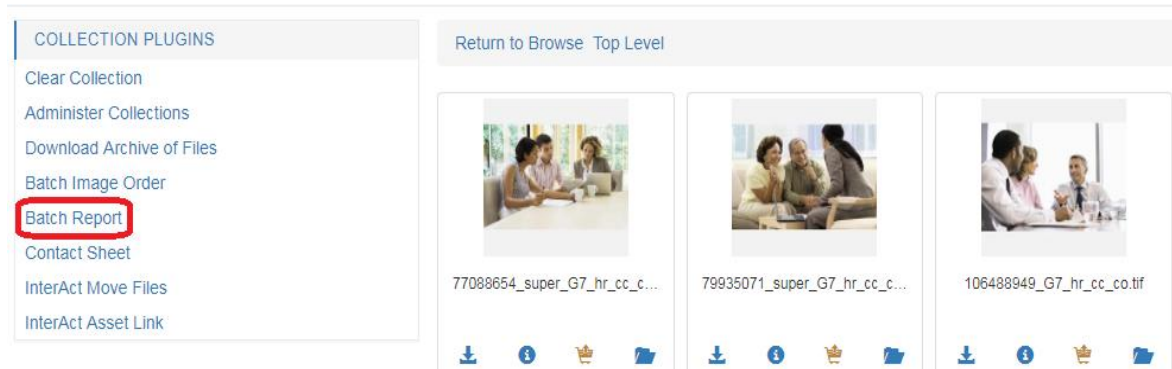


Select a collection to retrieve. This will replace or add the contents of the selected collection to the current collection.

How to create a PDF view of the files in your collection

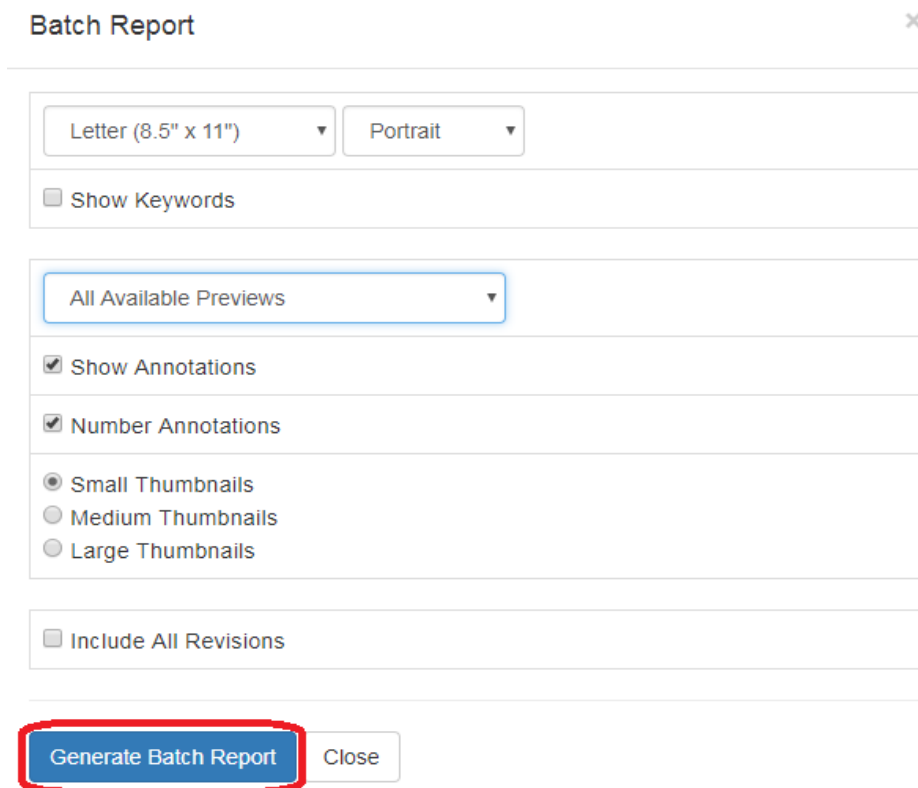
1. Batch Report

Once you have placed files in your collection, you can create a PDF view of those files by selecting the Batch Report option.



From here you can choose your options of what information will be displayed and the size of the image.

Note: all pages will be displayed with the preview option selected.



2. Contact Sheet

COLLECTION PLUGINS

- Clear Collection
- Administer Collections
- Download Archive of Files
- Batch Image Order
- Batch Report
- Contact Sheet**
- InterAct Move Files
- InterAct Asset Link

Return to Browse Top Level

77088654_super_G7_hr_cc_c...

79935071_super_G7_hr_cc_c...

106488949_G7_hr_cc_co.tif

From here you can choose the options of orientation, number of rows and columns, thumbnail, meta data, etc. to be added to your pdf report.

Contact Sheet ×

Letter (8.5" x 11") ▼ Portrait ▼

| | |
|-------------------|---|
| Number of columns | <input type="text" value="3"/> |
| Preview width | <input type="text" value="164"/> pixels ▼ |
| Number of rows | <input type="text" value="2"/> |
| Preview height | <input type="text" value="280"/> pixels ▼ |
| Font size | <input type="text" value="8"/> |

Include QR code

Source


License Type

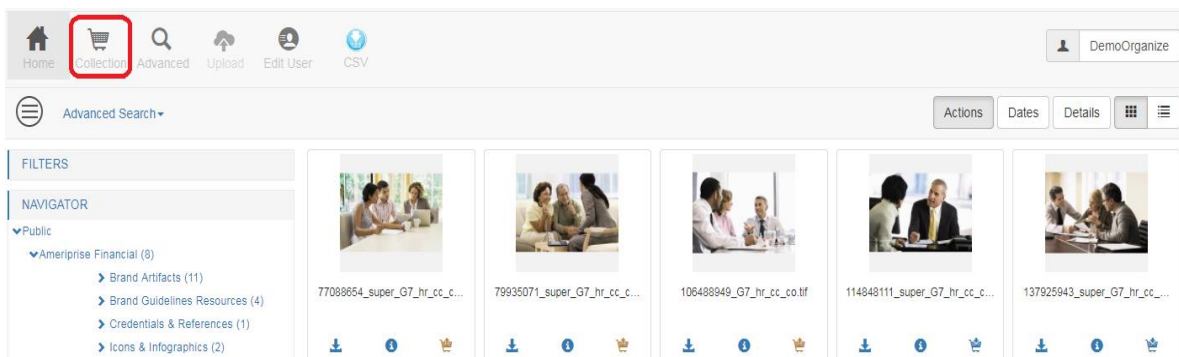
Expiration Date

Description

How to send a file or multiple files from the system via email link

- Can be used to send a file to someone who does not have access to the system.

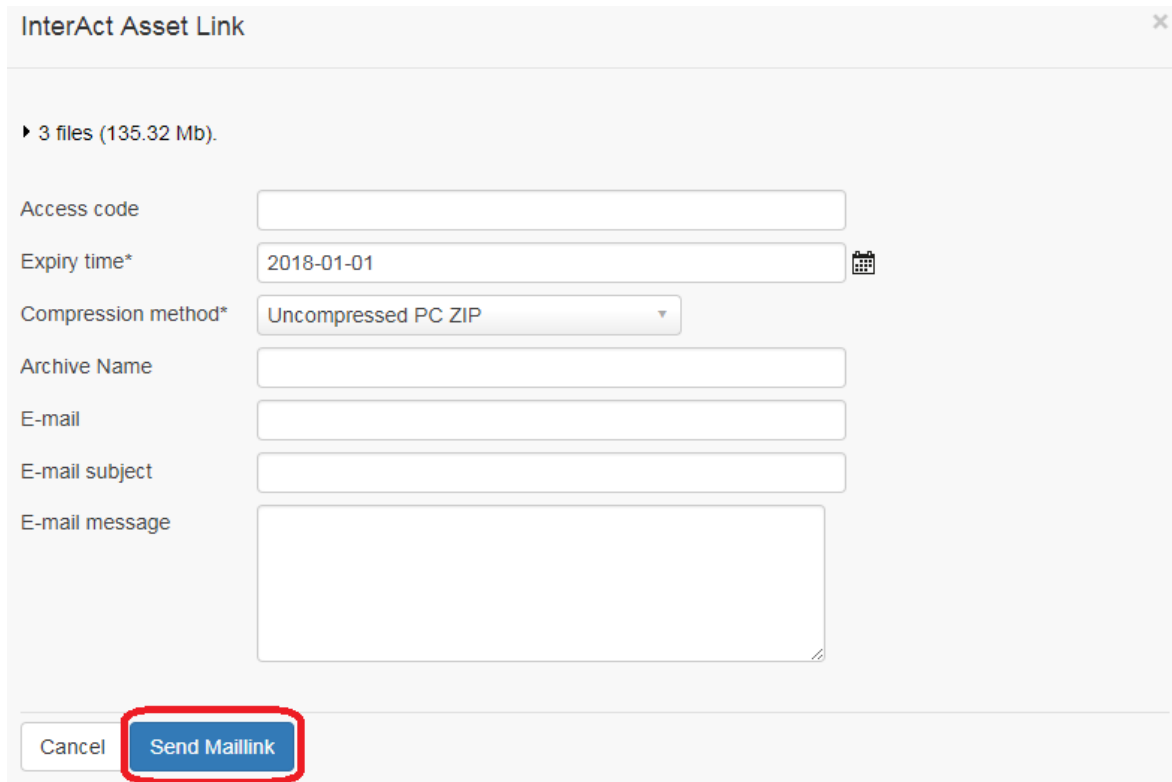
1. Select the file or files you want to send by adding them to your collection  .
2. Now select the shopping cart icon in the top horizontal tool bar to display your collection interface and options.



This will display your collection interface and from here you can select your Interact Asset link plug-in.



Below is the email interface display used to send your files. The Access code field is for a unique password to be defined by the sender (not required). Use the 'Expiry Time' drop down to set the expiry date and fill out the rest of the fields with the requested information:



The screenshot shows a window titled "InterAct Asset Link" with a close button (X) in the top right corner. Below the title bar, it displays "3 files (135.32 Mb)". The form contains the following fields:

- Access code: A text input field.
- Expiry time*: A date input field showing "2018-01-01" with a calendar icon to its right.
- Compression method*: A dropdown menu currently set to "Uncompressed PC ZIP".
- Archive Name: A text input field.
- E-mail: A text input field.
- E-mail subject: A text input field.
- E-mail message: A large text area for composing the email body.

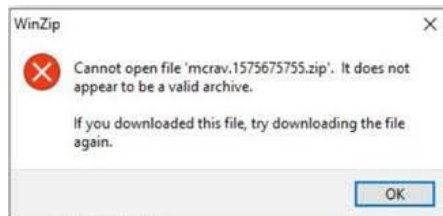
At the bottom of the window, there are two buttons: "Cancel" and "Send Maillink". The "Send Maillink" button is highlighted with a red rectangular border.

Then select the "Send Maillink" button to send your files.

Your recipient will receive two emails from:
interact@HDCDAM01.cgx.net

The first should contain a link to download files and the second will contain the access code you assigned. Now the recipient simply clicks the link and enters the access code to download the files you have sent.

***Hint:** You can include more than one recipient in the email field separated by a comma. Including yourself allows you to confirm the link was sent. Also, if you or the recipient receives the following error, you may need to try downloading the file again.



Organize Icon Definitions:



Change Password/Account Info – This allows the user to change their password or default download format.



Logout – Used to logout of the system.



Home or Top Level – This icon will take a user back to the main directory or top level of access for their account.



Collection (shopping cart) – This icon will add a file to the collection when selected from below the file thumbnail. When selected from the top horizontal tool bar, it will display the collection contents.



Search – Used to access the advance search interface page.



Download hi res – By selecting the download hi res icon the user will initiate the download of a full resolution file.



File Information – This will allow a user to see all of the metadata associated with that file.



Icon View – The short view allows the user to display file thumbnails with action icons below the thumbnail.



List view – The list view allows users to display the file names and the action items.

Actions

Actions button: When this option is turned on, it will display the action icons under the thumbnails of the files.

Dates

Dates button: When turned on, it will display the system dates of the files.

Details

Details button: When turned on, it will display the meta-data of the files.