



YellowFolder

The Education Documentation Experts

Welcome to Viewer Toolbar – Checking In and Out Training

PNE Name, Paperless Nation Engineer

***Please ensure you have used the phone dial in method for audio for this training.
If you have signed in via your computer audio, please switch to your phone audio.***

What enhancements are part of the new viewer toolbar?

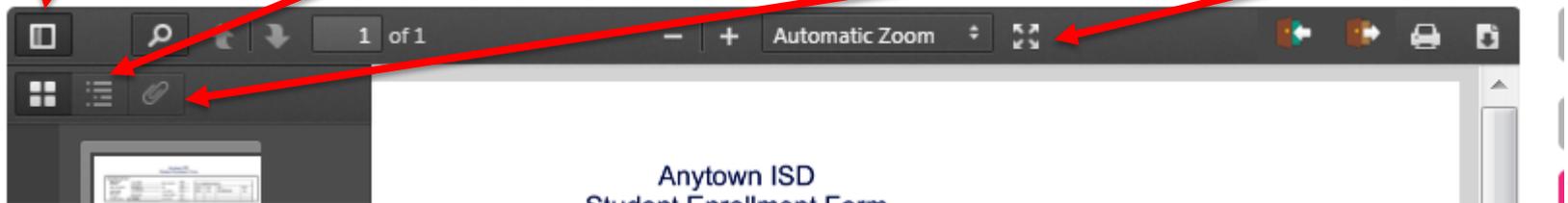


Toggle Side Bar

Bookmarking
(pages should be bookmarked before uploading)

Ability to attach additional documents to the viewed document prior to uploading

Full size page viewing



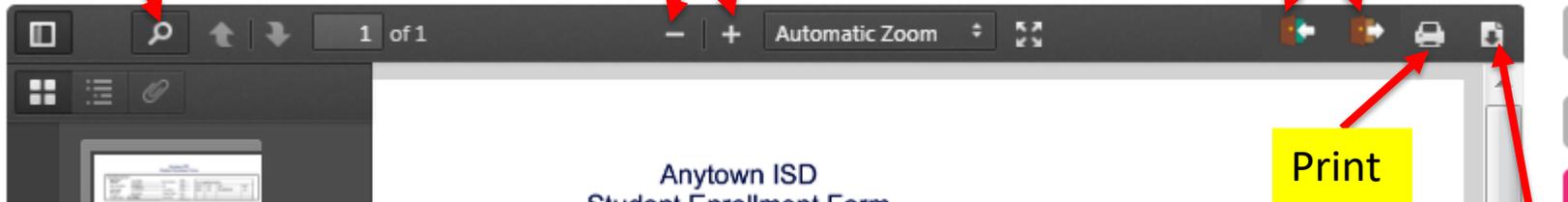
What other buttons are available on the viewer toolbar?



Search within a search

Zoom-in/
Zoom-out

Check Out/
Check In



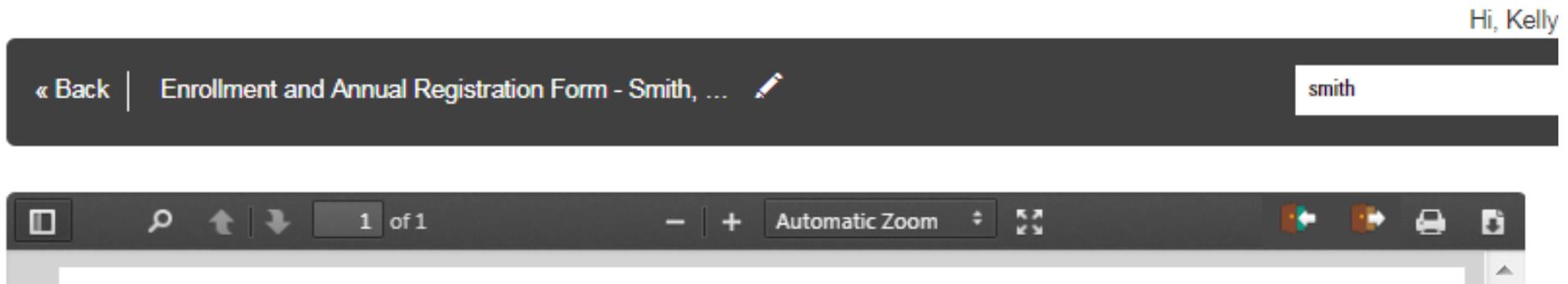
Print

Download

How do I use the tools while viewing a document?



Watch a live demonstration in the YellowFolder system of how to use the tools on the Viewer Toolbar.



Toggle Sidebar



This button allows the user to see a thumbnail list of all of the pages within the document. The user can click on any of the pages and jump to that page in document.

The screenshot displays the YellowFolder document viewer interface. At the top, there is a navigation bar with a search box and a 'Search' button. Below this is a toolbar with various icons for document navigation and zooming. The main area is split into two panes: a left sidebar and a right main content area. The sidebar contains a list of document pages, each with a thumbnail and a title. A 'Show More' button is located at the top of the sidebar. Red arrows point to the 'Show More' button and several thumbnails in the sidebar. The main content area displays the text of the selected page. On the far right, there is a 'Document Metadata' panel with fields for First Name, Last Name, Date of Birth, ID Number, Status, Account, Record Series, Document File Name, and Original File Name. Below the metadata panel is a 'Record Series Administrator' section with contact information.

Document Metadata

First Name:	Griselda
Last Name:	Yawn
Date Of Birth:	05/28/2018
ID Number:	525363414789
Status:	Active
Account:	QA1
Record Series:	SR
Document File Name:	Miscellaneous - Yawn, Griselda - 525363414789.pdf
Original File Name:	QA1_SR_D_06142

Record Series Administrator

yfqa.qa1.1.c@dispostable.com
Test234 Test1

Bookmarks



A user can bookmark pages prior to uploading and the bookmarks will be available in YellowFolder.

“When would this be helpful?”

For example, when using a Pre-YellowFolder cover sheet to upload an entire folder the user could bookmark student transcripts.

The screenshot displays a PDF viewer interface for a document titled "Miscellaneous - Yawn, Griselda - 525363414789.pdf". The document content includes an introduction to the Pdf995 Suite, a list of features, and document metadata. A red arrow points to the bookmark icon in the viewer's toolbar.

Document Metadata:

First Name:	Griselda
Last Name:	Yawn
Date Of Birth:	05/28/2018
ID Number:	525363414789
Status:	Active
Account:	QA1
Record Series:	SR
Document File Name:	Miscellaneous - Yawn, 525363414789.pdf
Original File Name:	QA1_SR_D_06142018

Record Series Administrator: yfqa.qa1.1.c@dispostable.com, Test234 Test1

Attachments



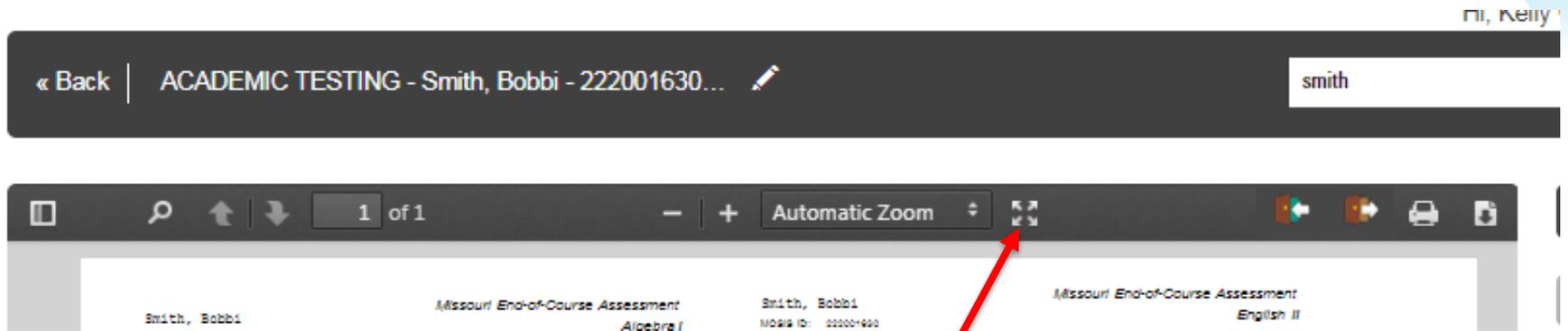
Prior to uploading a user can use a PDF creator to add attachments to a document. This would link the documents together. This feature is located inside the Toggle Sidebar.

The screenshot displays a web application interface for document management. At the top, a dark navigation bar contains a search bar and a search button. Below this, a document viewer is shown with a sidebar on the left. The sidebar contains a 'Toggle Sidebar' icon, which is highlighted by a red arrow from the text box. The main content area displays a document titled 'TCPDF Example 041' by Nicola Asuni. The document content includes the text: 'Example of File Attachment. Double click on the icon to open the attached file.' To the right of the document viewer, there is a sidebar with various actions: 'Previous', 'Next', 'Split Document', 'Share Document', 'View Document', 'Download Document', and 'Move Document'. Below these actions is a 'Document Metadata' section with the following information:

Document Metadata	
First Name:	Griselda
Last Name:	Yawn
Date Of Birth:	05/28/2018
ID Number:	525363414789
Status:	Active
Account:	QA1
Record Series:	SR
Document File Name:	Miscellaneous - Ya 525363414789.pdf
Original File Name:	QA1_SR_D_0614

At the bottom of the sidebar, there is a 'View Document Hi' button and a 'Chat with us' button.

Full Size Viewing



This button, located to the right side of the Zoom option, allows the user to view the document in full size. After viewing it full size, the user can press the “Esc” button to return to standard viewing within the YellowFolder platform.

Check Out



1. This button allows the user to “check out” the document.

« Back | ACADEMIC TESTING - Smith, Bobbi - 222001630.pdf | smith

1 of 1 70%

Smith, Bobbi
MOA# ID: 222001630
Campus: Joplin MO
Director: Joplin MO
Test Period: Spring 2020

Missouri End-of-Course Assessment
Algebra I

No Possible: 20
No Correct: 21
Scale Score: 200
Assessment Level: Proficient

Smith, Bobbi
MOA# ID: 222001630
Campus: Joplin MO
Director: Joplin MO
Test Period: Spring 2020

Missouri End-of-Course Assessment
Government

No Possible: 20
No Correct: 21
Scale Score: 200
Assessment Level: Proficient

Smith, Bobbi
MOA# ID: 222001630
Campus: Joplin MO
Director: Joplin MO
Test Period: Spring 2020

Missouri End-of-Course Assessment
English II

No Possible: 20
No Correct: 21
Scale Score: 207
Assessment Level: Proficient

Smith, Bobbi
MOA# ID: 222001630
Campus: Joplin MO
Director: Joplin MO
Test Period: Spring 2020

Missouri End-of-Course Assessment
Biology

No Possible: 20
No Correct: 21
Scale Score: 211
Assessment Level: Proficient

Smith, Bobbi
MOA# ID: 222001630
Campus: Joplin MO
Director: Joplin MO
Test Period: Spring 2020

Missouri End-of-Course Assessment
Algebra II

No Possible: 20
No Correct: 21
Scale Score: 200
Assessment Level: Proficient

Check Out Document

To edit a document or replace with a new version, click the Check Out button below. A copy of this file will immediately begin downloading.

Note: Users cannot modify this document while checked out, but can see who and when the document was checked out.

Check Out Cancel

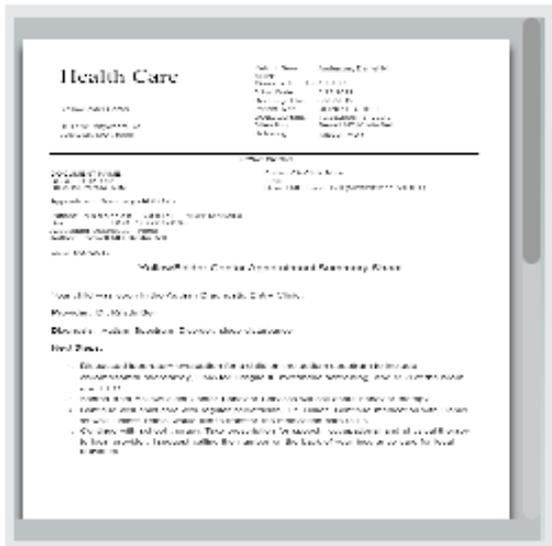
Check Out



Check Out Document



Physician Reports - Anderson, Daniel - 1234567899.pdf



To edit a document or replace with a new version, click the Check Out button below. A copy of this file will immediately begin downloading.

Note: Users cannot modify this document while checked out, but can see who and when the document was checked out.

Check Out

2. Click the Check Out button

Cancel

Check Out



Check Out Document X

File has been successfully checked out and downloaded.

3. Document will automatically download.

4. Open downloaded document, complete necessary activities and save the document.

YellowFolder The Education Documentation Experts

File Uploads Tools Logout

support: (844) YELLOW-9 (844) 935-5699 support@yellowfolder.com

Hi, Tessa Tyler (tyler.dms@yellowfolder.com)

Search Advanced Search

Order By Campus Name

SR

Active Archive Box Level

SPED HR

Missouri End-of-Course Assessment Government

Abbott, Quentin

MOSIS ID: 222001234

Campus: Anytown High

District: Anytown ISD

Test Period: Spring 2011

Missouri End-of-Course Assessment Biology

Abbott, Quentin

MOSIS ID: 222001234

Chat with us

YELLOWFOLDER_D...zip

Show all X

Check In and Out



0 uploads this month

0 uploads needing information

0 uploads needing verification

0 Batches in complete status

Bookmarks [View All](#)

- Standardized Testing - Anderson, Betty - 222001...
- Student Information Card - Anderson, Betty - 22...
- Standardized Testing - Anderson, Betty - 222001...

Recent Downloads [View All](#)

- Standardized Testing - Aguirre, Vivian - 22200123...
- Report Cards - Aguirre, Vivian - 222001239.pdf

Shared documents

Shared with Me Shared by Me

Saved Searches

Checked Out Documents

[View All](#)

- Physician Reports - An...

On your Application Screen, all checked out documents will be here until checked back in.

*Note: When a document is checked out, it can only be viewed... all other features will be inactive for it.

In the document list view, this symbol denotes a file is checked out.

<input type="checkbox"/>	Filename	Action	Doc Date	
<input type="checkbox"/>	PDF Physician Reports - Anderson, Daniel - 1...	View Download	07/09/2013	

Check In



0 uploads this month

0 uploads needing information

0 uploads needing verification

0 Batches in complete status

Bookmarks

[View All](#)

- Standardized Testing - Anderson, Betty - 222001...
- Student Information Card - Anderson, Betty - 22...
- Standardized Testing - Anderson, Betty - 222001...

Recent Downloads

[View All](#)

- Standardized Testing - Aguirre, Vivian - 22200123...
- Report Cards - Aguirre, Vivian - 222001239.pdf

Saved Searches

Checked Out Documents

[View All](#)

-  Physician Reports - An...

Shared documents

[PDF](#)

Shared with Me Shared by Me

To Check In a document:
1. Click the arrow beside the document to be checked back in to open that document.

Check In



This button allows the user to “check in” a new version of the document.

NOTE: If you do not want to upload a new version of the document, you may cancel the check out.

1. Click Check In icon

Check In



our Title : Full Subscriber [Show More](#)

er By
Campus Name

80%

1 / 2

Split Document

Share Document

View Document

Download Document

Edit Document Metadata

Document Metadata

First Name: Daniel

Middle Name: N

Last Name: Anderson

Alias:

28/2006

ID Number: 12345

Check In Document

Physician Reports - Anderson, Daniel - 1234567899.pdf

Choose an option below and click the Check In button.

Upload New Version

Cancel Check Out

Returns the document without creating a new version.

Check In

Cancel

Your child was se

Provider: Dr. Kristin Bell

2. Choose Upload New Version radio button.

3. Click Browse to locate saved version of document on your computer.

NOTE: If you do not want to upload a new version of the document, you may cancel the check out

Check In



4. When find document, double click it to attach.

The screenshot shows a Windows File Explorer window open to the Desktop. The selected file is 'Yearly Attendance Record - Adams, Guadalupe - 222001236.pdf'. A tooltip is visible over the file, displaying: 'Item type: PNG image', 'Dimensions: 1306 x 1010', and 'Size: 306 KB'. The background shows the YellowFolder web interface with a 'Check In Document' dialog box and a search bar.

Check In

5. Document title will appear in Browse window.
6. Click Check In button.

Check In Document

Yearly Attendance Record - Adams, Guadalupe - 222001236.pdf

Choose an option below and click the Check In button.

Upload New Version

Yearly Attendance Record - Ad:

Cancel Check Out

Returns the document without creating a new version.

Yes	01/06/2016	IT	0.000	0.000	late
Yes	01/26/2016	IT	0.000	0.000	late
Yes	02/04/2016	IAAAAA	8.000	8.000	
Yes	02/11/2016	IAWWA	8.000	8.000	

Days in School Calendar (09/20/2015 to 02/13/2016): 107 Days
Days this Student Enrolled: 107 Days

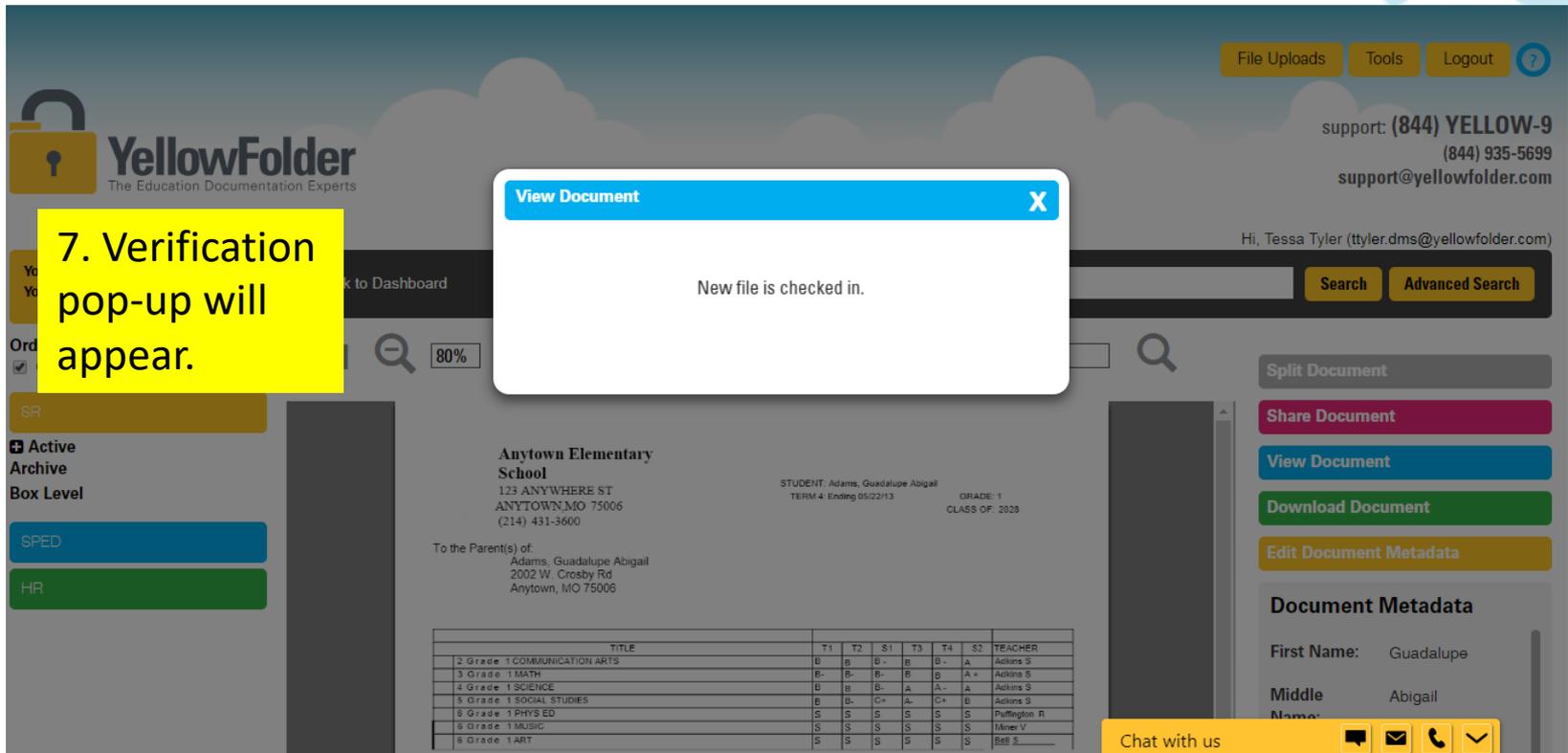
Total Real Days Absent: 0 Full days = 0 Half days = 5.0 Days
Total Real Days Present: 102.0 Days
Percent (based on Real Days): 95.32%

Check In

7. Verification pop-up will appear.

View Document X

New file is checked in.



The screenshot shows the YellowFolder web interface. At the top right, there are buttons for 'File Uploads', 'Tools', and 'Logout'. Below these, the support information is displayed: 'support: (844) YELLOW-9 (844) 935-5699 support@yellowfolder.com'. A user greeting 'Hi, Tessa Tyler (ttyler.dms@yellowfolder.com)' is visible. The main content area displays a report card for 'Anytown Elementary School' for student 'Adams, Guadalupe Abigail'. The report card includes a table of grades for various subjects across six terms. A yellow pop-up window titled 'View Document' is overlaid on the report card, displaying the message 'New file is checked in.'.

Anytown Elementary School
123 ANYWHERE ST
ANYTOWN, MO 75006
(214) 431-3600

STUDENT: Adams, Guadalupe Abigail
TERM 4: Ending 05/22/13
GRADE: 1
CLASS OF: 2028

To the Parent(s) of:
Adams, Guadalupe Abigail
2002 W. Crosby Rd
Anytown, MO 75006

TITLE	T1	T2	S1	T3	T4	S2	TEACHER
2 Grade 1 COMMUNICATION ARTS	B	B	B-	B	B-	A	Adkins S
3 Grade 1 MATH	B-	B-	B-	B	B	A+	Adkins S
4 Grade 1 SCIENCE	B	B	B-	A	A-	A	Adkins S
5 Grade 1 SOCIAL STUDIES	B	B-	C+	A	C+	B	Adkins S
6 Grade 1 PHYS ED	S	S	S	S	S	S	Puffington R.
6 Grade 1 MUSIC	S	S	S	S	S	S	Miner V
6 Grade 1 ART	S	S	S	S	S	S	Bell S.

Print or Download



The Print button will bring up the user's default printer. It will allow the user to print the entire document or pick the specific pages that are needed for printing.

The Download button will place a copy of the document on the user's screen, which can be opened or saved to the user's computer desktop.

« Back | ACADEMIC TESTING - Smith, Bobbi - 222001630.pdf

smith

1 of 1 Automatic Zoom

Smith, Bobbi MOBIS ID: 222001630 Campus: Anytown ISD District: Anytown ISD Test Period: Spring 2009	<i>Missouri End-of-Course Assessment</i> <i>Algebra I</i> No. Possible: 39 <u>No. Correct: 29</u> <u>Scale Score: 200</u> Achievement Level: Proficient	Smith, Bobbi MOBIS ID: 222001630 Campus: Anytown High District: Anytown ISD Test Period: Spring 2011	<i>Missouri End-of-Course Assessment</i> <i>English II</i> No. Possible: 35 No. Correct: 31 <u>Scale Score: 227</u> Achievement Level: Advanced
Smith, Bobbi MOBIS ID: 222001630	<i>Missouri End-of-Course Assessment</i> <i>Government</i>	Smith, Bobbi MOBIS ID: 222001630	<i>Missouri End-of-Course Assessment</i> <i>Biology</i>

Uploading Documents



Your turn to view a document and see how easy it is to use the Viewer Toolbar options.

Any Questions or Additional Support/Training Needed



To learn more about the features in YellowFolder, go to www.yellowfolder.com and click on **Training** for a list of Weekly Live Training Sessions available each week. Simply register and you will receive an invitation to attend the virtual session from your desk.

Any Questions or Additional Support/Training Needed



Questions, Problems?
We're here for YOU.



Support 214.431.3600 (dial 2) • support@yellowfolder.com

Contact Support for:

- General questions about using YellowFolder
- Software support
- YellowFolder Tool(s) Support (*Droplet, Virtual Printer, Scan & Upload*)
- Assistance finding digitized documents
- Remote virtual training
- CSV file related items
- Matriculation related items
- User access related items



Record Retrieval 214.431.3600 (dial 2) • recordrequest@yellowfolder.com

Contact Record Retrieval for:

Retrieving non-digitized documents. These are generally documents YellowFolder is only storing in the warehouse (*never been digitized*). However, this also applies to documents that have not been digitized yet (*open project*).

*Completion of a Records Request Form is necessary for prompt retrievals. The form can be obtained by contacting support@YellowFolder.com or recordrequest@YellowFolder.com



Paperless Nation Engineer (PNE) *Each PNE member has their own contact information.*

About Paperless Nation Engineers:

- Educational Consultant for a smooth transition to YellowFolder
- Creation and modification of your unique File Structure
- Guidance in implementation and procedure planning to incorporate the culture change necessary to go paperless
- On-site and virtual trainings (*both initial and refreshers*) to ensure users understand how to best utilize YellowFolder
- On-going assessments of the implementation and usage of YellowFolder to inform your Administration and provide support



Accounting accounting@yellowfolder.com

Contact Accounting for: All billing/invoice related questions

PNE Contact Information



- ▶ PNE- Enter Name

- ▶ Enter phone number

- ▶ xxxx@yellowfolder.com

- ▶ Address:

1617 W Crosby Road Suite 100

Carrollton, TX 75006