



# YellowFolder

The Education Documentation Experts

## Welcome to Renaming a Document Title 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.***

# Renaming a Document



Renaming a Document is a feature that **allows you to change the name of a document** to a title that best meets your needs.

Renaming a document should be used **when you want to change the name of a document** so it's easier for you to locate.

Note: The original file name is

- maintained with:
  - Droplet
  - Upload, however will not when doc is manipulated (merged, split...)
- not maintained using:
  - Scan since doc comes from paper and doesn't have a name
  - VP because of variety of ways printed with and without names, plus some printers allow original file names, while others do not (out of our control)

# How do I Rename a Document?



Watch a live demonstration in the YellowFolder system of how to Rename a document.

<input type="checkbox"/>	Filename	Action	Doc Date
<input checked="" type="checkbox"/>	BENEFITS AND BENEFICIARY DESIGNAT...	View    Download	08/01/2013
<input type="checkbox"/>	Benefit Application - Abbott, Jacob - 9876...	View    Download	12/11/2017

# Renaming a Document

A / Abbott, Jacob - 9876543210 / BENEFITS AND BENEFICIARY DESIGNATION

<input type="checkbox"/>	Filename	Action	Doc Date
<input checked="" type="checkbox"/>	 BENEFITS AND BENEFICIARY DESIGNAT...	  View Download	08/01/2013
<input type="checkbox"/>	 Benefit Application - Abbott, Jacob - 9876...	 View Download	12/11/2017

« Back | BENEFITS AND BENEFICIARY DESIGNATION - Abbot... 

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**FIRST READ INSTRUCTIONS ON BACK OF FORM -DO NOT DETACH**

The following statements are made for my membership record in The Public School Retirement System of Anytown:

ME (Do not use initials)

Abbott- Jacob Simon Simon  
(Last Name) (First Name) (Middle Name) (Maiden Name if Married Woman)

MEMBERSHIP NUMBER

PERMANENT HOME ADDRESS

Anystreet Drive Anytown 75006 AnyCounty MO  
(Street Name) (City) (Zip Code) (County) (State)

DATE OF BIRTH: 1/1/1970  
(Month) (Day) (Year)

CHECK by (X) Male  Single   
 Female  Married

9876543210  
(Social Security Number)

WITHDRAWAL NUMBER

DISABILITY/RETIREMENT NUMBER

COMPLETE NAME PERMANENT ADDRESS RELATIONSHIP

Renaming a document can be accessed when the document is in the PDF viewer or from the document list.

# Renaming a Document



**From the document list:**  
Hover over the document name and a pencil icon appear.  
Click on the pencil to the right of the document name.

A / Abbott, Jacob - 9876543210 / BENEFITS AND BENEFICIARY DESIGNATION						
<input type="checkbox"/>	Filename		Action			Doc Date
<input checked="" type="checkbox"/>	BENEFITS AND BENEFICIARY DESIGNAT...		View	Download		08/01/2013
<input type="checkbox"/>	Benefit Application - Abbott, Jacob - 9876...		View	Download		12/11/2017

# Renaming a Document



**The document name should now show in an editable text field.**

You can delete the YellowFolder document name altogether and type your own.

OR

You can leave the YellowFolder naming convention and add your document name to the beginning or end of the YellowFolder document name. This may cause you to run out of room in the title.

A / Abbott, Jacob - 9876543210 / BENEFITS AND BENEFICIARY DESIGNATION

<input type="checkbox"/>	Filename	Action	Doc Date
<input checked="" type="checkbox"/>	<input type="text" value="BENEFITS AND BENEFICIARY DESIGNATION"/>	View Download	08/01/2013
<input type="checkbox"/>	Benefit Application - Abbott, Jacob - 9876...	View Download	12/11/2017

# Renaming a Document

Click the checkbox to the right of the editable text field to save your new document name.

A / Abbott, Jacob - 9876543210 / BENEFITS AND BENEFICIARY DESIGNATION  

<input type="checkbox"/>	Filename	Action	Doc Date
<input type="checkbox"/>	 2017 Benefits Selections - John Doe E <input checked="" type="checkbox"/> 	 View Download	08/01/2013
<input type="checkbox"/>	 Benefit Application - Abbott, Jacob - 9876...	 View Download	12/11/2017

# Renaming a Document



**When the document is in the PDF viewer:**  
The document name is listed at the top in the black bar.  
Click on the pencil icon to the right of the document name.

« Back | BENEFITS AND BENEFICIARY DESIGNATION - Abbot...

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DO NOT FOR

**FIRST READ INSTRUCTIONS ON BACK OF FORM -DO NOT DETACH**

The following statements are made for my membership record in The Public School Retirement System of Anytown:

NAME (Do not use initials)

Abbott- Jacob Simon Simon  
(Last Name) (FirstName) (Middle Name) (MaidenName if Married Woman)

MEMBERSHIP NUMBER

PERMANENT HOME ADDRESS

Anystreet Drive Anytown 75006 AnyCounty MO  
(City) (Zip Code) (County) (State)

WITHDRAWAL NUMBER

1/1/1970  
(Month) (Day) (Year)

CHECK by (x) Male  Single [X] 9876543210  
Female  Married  (Social Security Number)

DISABILITY RETIREMENT NUMBER

COMPLETE NAME PERMANENT ADDRESS RELATIONSHIP

# Renaming a Document



The document name should now show in an editable text field.

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« Back | BENEFITS AND BENEFICIARY DESIGNATION - Abbott, J ✓ ✕

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**COPY** **DO NOT FOI**

FIRST READ INSTRUCTIONS ON BACK OF FORM -DO NOT DETACH

The following statements are made for my membership record in The Public School Retirement System of Anytown:

Abbott-                      Jacob                      Simon                      Simon  
(Last Name)                      (FirstName)                      (Middle Name)                      (Maiden Name if Married Woman)

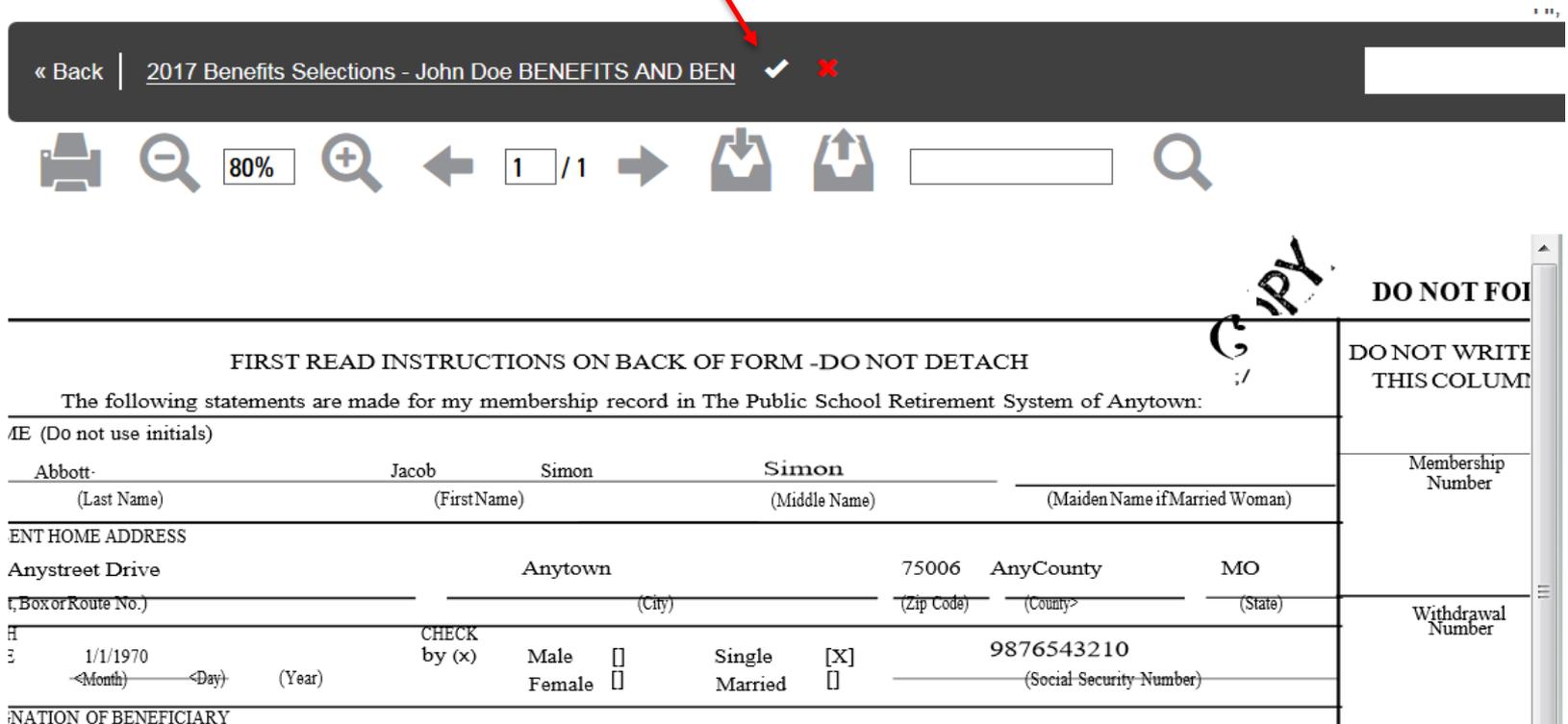
ENT HOME ADDRESS

Anystreet Drive                      Anytown                      75006                      AnyCounty                      MO

Membership Number

# Renaming a Document

Click the checkbox to the right of the editable text field to save your new document name.



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**FIRST READ INSTRUCTIONS ON BACK OF FORM -DO NOT DETACH**

The following statements are made for my membership record in The Public School Retirement System of Anytown:

Abbott- Jacob Simon Simon  
(Last Name) (First Name) (Middle Name) (Maiden Name if Married Woman)

Anytown 75006 AnyCounty MO  
(City) (Zip Code) (County) (State)

1/1/1970  
<Month> <Day> (Year)

CHECK by (x) Male  Single [X] 9876543210  
Female  Married  (Social Security Number)

DO NOT WRITE THIS COLUMN

Membership Number

Withdrawal Number

# Renaming a Document



***Your turn to try renaming a document. If you do not wish to complete the entire process at least walk through the steps to ensure you understand the process.***

# Any Questions or Additional Support/Training Needed



To learn more about the features in YellowFolder, go to [www.yellowfolder.com](http://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 Needed Additional Support/Training



Questions, Problems?  
We're here for YOU.



**Support** 214.431.3600 (dial 2) • [support@yellowfolder.com](mailto: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](mailto: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](mailto:support@YellowFolder.com) or [recordrequest@YellowFolder.com](mailto: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](mailto:accounting@yellowfolder.com)

**Contact Accounting for:** All billing/invoice related questions

# PNE Contact Information



- ▶ PNE- Enter Name
  - ▶ Enter phone number
  - ▶ [xxxx@yellowfolder.com](mailto:xxxx@yellowfolder.com)

- ▶ Address:

1617 W Crosby Road Suite 100

Carrollton, TX 75006