



YellowFolder

The Education Documentation Experts

Welcome to Sharing Documents 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.***

Documents can be shared in two methods:

1. Public Link

- When sharing with those who are not YellowFolder users

2. Private Link

- When sharing with those who are YellowFolder users

Sharing Documents



YellowFolder
The Education Documentation Experts

File Uploads Tools Logout

Hi, Sharon McClain (smcclain.dms@yellowfolder.com)

Your Access : Archive Admin
Your Title : Full Subscriber

Order By
 Campus Name

SR

Active

- Anytown Elementary School
- Anytown High School
- Anytown Middle School

Archive

- Anytown Elementary School
- Anytown High School
- Anytown Middle School

SPED

HR

Search Results: "aguirre, vivian"

<input type="checkbox"/>	Score	Filename	Action	Doc Date
<input type="checkbox"/>		Report Cards - Aguirre, Vivian - 222001239.pdf	View Download	05/22/2013
<input type="checkbox"/>		Certificates - Santos, Vivian - 9876543617.pdf	View Download	10/21/2016
<input type="checkbox"/>		Transcripts - Santos, Vivian - 9876543617.pdf	View Download	10/01/2014
<input type="checkbox"/>		Evaluations - White, Alayna - 9876543694.pdf	View Download	08/17/2013
<input type="checkbox"/>		Evaluations - Santos, Vivian - 9876543617.pdf	View Download	08/17/2013
<input type="checkbox"/>		Standardized Testing - Aguirre, Vivian - 222001239.pdf	View Download	08/25/2015
<input type="checkbox"/>		Standardized Testing - Aguirre, Vivian - 222001239.pdf	View Download	10/23/2016
<input type="checkbox"/>		Transcripts - White, Alayna - 9876543694.pdf	View Download	10/01/2014
<input type="checkbox"/>		Certificates - White, Alayna - 9876543694.pdf	View Download	10/21/2016
<input type="checkbox"/>		Employee I-9 - Santos, Vivian - 9876543617.pdf	View Download	08/01/2013
<input type="checkbox"/>		Immunization Shot Record - Aguirre, Vivian - 222001239.pdf	View Download	10/21/2016
<input type="checkbox"/>		Yearly Attendance Record - Aguirre, Vivian - 222001239.pdf	View Download	02/17/2016
<input type="checkbox"/>		Caretera Plans - Forms - White, Alayna - 9876543694.pdf	View Download	08/01/2013

Share Document
View Document
Download Document
Edit Document Metadata

Record Series Administrator
anytownsr.rsa@yellowfolder.com
SR_ANYTownRSA_In SR_ANYTownRSA_In

To Share a document, check the box beside the document and click the pink Share Document button

Sharing Documents



Share Document X

Share Privately
 Share Publicly

Document(s)

 IEPs - Anderson, Julie - ...

Create Public Link
A public link allows anyone to view or download, if permitted, without logging in.

Expires  Allow Downloads

Document Link:
<https://dms.yellowfolder.com/Home/Index?Id=413699D8718C50A068E7EE3EFFC4C74EC082469F4FB54C670C04D2D78EE6E0A239BAD01B84EAD2A64C59A91F051ACCD0&AliasName=ANT&SharedType=Public>

Link expires 12/11/2016

- 1) Choose to share the document privately (with other YellowFolder users) or publicly (with anyone).
- 2) Select expiration of link date.
- 3) Check to allow downloads.
- 4) Click Next button.

Sharing Documents



Share Document



Share Publicly

Document(s)

 IEPs - Anderson, Julie - ...

Sharing a public link allows anyone to view or download, if permitted, without logging in.

[Share in my Email](#) or, Share via YellowFolder

To

Subject

I would like to share files with you through YellowFolder.
Click this link to access the files:

<https://dms.yellowfolder.com/Home/Index?Id=413699D8718C50A068E7EE3EFFC4C74EC082469F4FB54C670C04D2D7>

Cancel

Send

- 5) Enter email in “To” field and information in “Subject” field.
- 6) Click Save button.

Sharing Multiple Documents



Sharing file from within the **same** subfolder:

Document List

<input checked="" type="checkbox"/>	Filename	Action	Doc Date
<input checked="" type="checkbox"/>	 Standardized Testing - Anderson, Betty - 2220...	 View Download	08/25/2015
<input checked="" type="checkbox"/>	 Standardized Testing - Anderson, Betty - 2220...	 View Download	08/25/2015
<input checked="" type="checkbox"/>	 Standardized Testing - Anderson, Betty - 2220...	 View Download	10/21/2016

Share Document

View Document

Download Document

Edit Document Metadata

Record Series Administrator

 anytownsr.rsa@yellowfolder.c...

SR_ANYTownRSA_fn

SR_ANYTownRSA_In

- 1) Check boxes in front of the desired files
- 2) Click on pink "Share Document" button
- 3) Follow same process as sharing one document

Sharing Multiple Documents



Files from **different** subfolders:

Document List

<input type="checkbox"/>	Filename	Action	Doc Date
<input type="checkbox"/>	Standardized Testing - Anderson, Betty - 2220...	View Download	08/25/2015
<input type="checkbox"/>	Standardized Testing - Anderson, Betty - 2220...	View Download	08/25/2015
<input type="checkbox"/>	Standardized Testing - Anderson, Betty - 2220...	View Download	10/21/2016

1) Bookmark all desired files within different subfolders for the same person

Share Document

View Document

Download Document

Edit Document Metadata

Record Series Administrator

anytownsr.rsa@yellowfolder.c...
SR_ANYTownRSA_fn
SR_ANYTownRSA_In

Document List

<input type="checkbox"/>	Filename	Action	Doc Date
<input type="checkbox"/>	Yearly Attendance Record - Anderson, Betty - ...	View Download	02/17/2016

Share Document

View Document

Download Document

Edit Document Metadata

Record Series Administrator

anytownsr.rsa@yellowfolder.c...
SR_ANYTownRSA_fn
SR_ANYTownRSA_In

2) Click the Yellow Lock to return to Dashboard and view all bookmarked documents

Sharing Multiple Documents



Files from **different** subfolders:

Hi, Sharon McClain (smcclain.dms@yellowfolder.com)

Your Access : Archive Admin
Your Title : Full Subscriber
[Show More](#)

Search Advanced Search

Order By
 Campus Name

SR

Active

- Anytown Elementary School
- Anytown High School
- Anytown Middle School

Archive

SPED

Bookmarked Documents

<input checked="" type="checkbox"/>	Filename	Action	Doc Date
<input checked="" type="checkbox"/>	Standardized Testing - Anderson, Betty - 2220...	View Download	08/25/2015
<input checked="" type="checkbox"/>	Standardized Testing - Anderson, Betty - 2220...	View Download	08/25/2015
<input checked="" type="checkbox"/>	Standardized Testing - Anderson, Betty - 2220...	View Download	10/21/2016
<input checked="" type="checkbox"/>	Report Cards - Anderson, Betty - 222001240.pdf	View Download	05/22/2013
<input checked="" type="checkbox"/>	Yearly Attendance Record - Anderson, Betty - ...	View Download	02/17/2016

Share Document

View Document

Download Document

Edit Document Metadata

Record Series Administrator

- anytownsr.rsa@yellowfolder.c...
SR_ANYTownRSA_fn
SR_ANYTownRSA_In

3) Select files to be shared

4) Click "Share Document" button and follow same process as sharing a single document

Sharing Documents



Demo of sharing a link:

<https://www.dropbox.com/s/xl8pp94vz8tcomb/Sharing%20Documents.mp4?dl=0>

Watch my live demo of sharing a link.

Your turn to try sharing a link. We recommend emailing the link to yourself to test it.

Any Questions or Needed Additional Support/Training

- Online support can be found at support@yellowfolder.com or recordrequest@yellowfolder.com
- The support helpline number is 214-431-3600 or 844-YELLOW-9 (press 2 to speak with a representative)
- Your YellowFolder Paperless Nation Engineer is **PNE Name** (pne@yellowfolder.com)