



# YellowFolder

The Education Documentation Experts

## Welcome to Verification/Information Required and Navigation 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.***

# Interactive Dashboard



Watch a live demonstration in the YellowFolder system of how to use the Interactive Dashboard.

The screenshot displays the YellowFolder dashboard for user Kelly Oglesby. The interface includes a top navigation bar with 'File Uploads', 'Tools', and 'Logout' buttons. The main header features the YellowFolder logo and contact information: support: (844) YELLOW (844) 935-56 and support@yellowfolder.co. A user profile bar shows 'Your Access: Archive Admin' and 'Your Title: Full Subscriber'. The dashboard is divided into several sections: a left sidebar with 'Order By' options (Campus, Name) and 'Box Level' filters (SR, Active, Archive, SPED, HR, AR); a central 'Welcome, Kelly Oglesby' area with four summary cards: 62 uploads this month, 53 uploads needing information, 18 uploads needing verification, and 29 batches in complete status; a 'Recent Downloads' section showing a file named '2016 Yearly Attendance Record - Abbott, Quentin - ...'; and a 'Saved Searches' section. A 'Bookmarks' section indicates that no documents have been bookmarked yet. A 'Checked Out Documents' section is also visible at the bottom right.

# Interactive Home Page



Click on the Lock to go back to this Dashboard from any screen

Takes you to Upload/Scan/Print Dashboard system

Takes you to downloadable Droplet and Printer tools

The dashboard home page for Sharon McClain includes the following sections:

- Header:** YellowFolder logo, navigation links (File Uploads, Tools, Logout), and a search bar.
- User Profile:** "Your Access: Archive Admin", "Your Title: Full Subscriber", and a "Show More" link.
- Order By:** Radio buttons for "Campus" and "Name".
- Active:** A list of schools: Anytown Elementary School, Anytown High School, and Anytown Middle School.
- Archive:** A list of schools: Anytown Elementary School, Anytown High School, and Anytown Middle School.
- SPED:** A blue button.
- HR:** A green button.
- Welcome, Sharon McClain:** Four summary cards showing 0 uploads this month, 0 uploads needing information, 0 uploads needing verification, and 0 batches in complete status.
- Bookmarks:** A list of bookmarked documents, including "Standardized Testing - Anderson, Betty - 222001240.pdf".
- Recent Downloads:** A list of recently downloaded documents, including "Standardized Testing - Aguirre, Vivian - 222001239.pdf" and "Report Cards - Aguirre, Vivian - 222001239.pdf".
- Shared documents:** A table with columns for Link Name, Expiration Date, Link Type, and Shared By. It currently shows "No documents are shared with you."
- Saved Searches:** A section for saved search queries.
- Checked Out Documents:** A section for documents currently checked out.
- Record Series Administrator:** Contact information for anytownsr.rsa@yellowfolder.com.

Bookmarks

Recent Downloads

Advanced Search

# Interactive Home Page



Personal Monthly Uploads

Information Required

Verification Required

In-Process and Completed

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

Order By  
 Campus  Name

SR

Active Archive  
3ox Level

SPED

HR

Welcome, Sharon McClain

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: No documents are shared with you.

Shared by Me: No documents are shared by you.

Saved Searches

Checked Out Documents

Saved Searches

Checked Out Documents

Shared Documents

# Interactive Home Page



[File Uploads](#) [Tools](#) [Logout](#) [?](#)

Support contact information

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

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  
Archive  
Box Level

SPED

HR

Welcome, Sharon McClain

0  
uploads this month

0  
uploads needing information

0

0

Support Live Chat and contact information

Saved Searches

- [Bookmarks](#) [View All](#)
- Standardized Testing - Anderson, Betty - 222001...
  - Student Information Card - Anderson, Betty - 22...

- [Recent Downloads](#) [View All](#)
- Standardized Testing - Aguirre, Vivian - 22200123...
  - ...

Checked Out Documents

# Interactive Home Page

Click to bring up options



Click for chat box

Click to hide options

Chat with us



Shows email address

Shows phone number

Fill out information and click Send Chat Request

Chat with us!



Enter your info below to begin.

First Name

Last Name

Email

Enter your Question

Send Chat Request

# Dashboard



All uploads appear on user's dashboard

To get to your dashboard, you can click on File Uploads, Uploads this month, Uploads needing information, Uploads needing verification, or Batches in complete status.

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

Order By  
 Campus  Name

SR

**Active Archive**  
Box Level

SPED

HR

Welcome, Sharon McClain

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...

**Recent Downloads** [View All](#)

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

**Saved Searches**

**Checked Out Documents**

Search Advanced Search

File Uploads Tools Logout

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

Sharon McClain (smcclain.dms@yellowfolder.com)

# Dashboard



All uploads appear on user's dashboard

The screenshot shows the YellowFolder dashboard interface. At the top, there is a navigation bar with tabs: 'Sample Files', 'Dashboard', 'Scan & Upload', 'Search Records', and 'Logout'. Below the navigation bar, the YellowFolder logo is on the left, and contact information is on the right: 'support: (844) YELLOW-9 (844) 935-5699 support@yellowfolder.com'. A personalized greeting reads 'Hi, Sharon McClain (smcclain.dms@yellowfolder.com)'. The main content area is titled 'Downloads' and contains two cards. The first card is for 'Droplet', showing a yellow folder icon with a padlock, 'Latest Version: 3.0.1', 'Your Version: 3.0.1', and system requirements: 'Operating System: Window 7 or higher', 'Processor: Intel Core 2 Duo Processor or higher', 'RAM: 4 GB', 'HDD: 10 GB of free space'. The second card is for 'Printer (64 bit)', showing a printer icon with a padlock, 'Latest Version: 3.0.0', 'Your Version: 3.0.0', and system requirements: 'Operating System: Window 7 or higher', 'Processor: Intel Core 2 Duo Processor or higher', 'RAM: 4 GB', 'HDD: 10 GB of free space'. A red arrow points from the 'Dashboard' tab to the top of the dashboard content.

If you see this screen when you log into YellowFolder after uploading documents, Click the Dashboard tab to bring up your dashboard.

This screenshot shows a different view of the YellowFolder dashboard. The navigation bar has tabs: 'Download', 'Scan & Upload', 'Search Records', and 'Logout'. The YellowFolder logo is on the left, and the personalized greeting 'Hi, Sharon McClain (smcclain@yellowfolder.com)' is on the right. Below the greeting, the word 'Dashboard' is displayed in a dark bar. A red arrow points from the 'Dashboard' tab in the navigation bar to this 'Dashboard' label.

This is how the dashboard initially appears before doing any uploads.

# Dashboard



Appearance of Dashboard after an upload when document is going through OCR processing

The screenshot shows a web browser window with the URL <https://erm.yellowfolder.com/Dashboard.aspx>. The dashboard header includes the YellowFolder logo and navigation buttons: Download, Scan & Upload, Search Records, and Logout. Below the header, the user is identified as Sharon McClain (smcclain@yellowfolder.com). The main content area is titled 'Dashboard' and 'In Process & Completed'. A table displays the following data:

Date	Batch Name	Record Series	Channel	Status
08/25/2016	PNC-P08252016-45268_PNC_Categorize Scan		Print	OCR Processing

Below the table, it indicates 'Results 1 to 1 of 1' and 'Page 1 of 1'.

Batch name

Record series of batch will be listed unless user has access to more than one record series

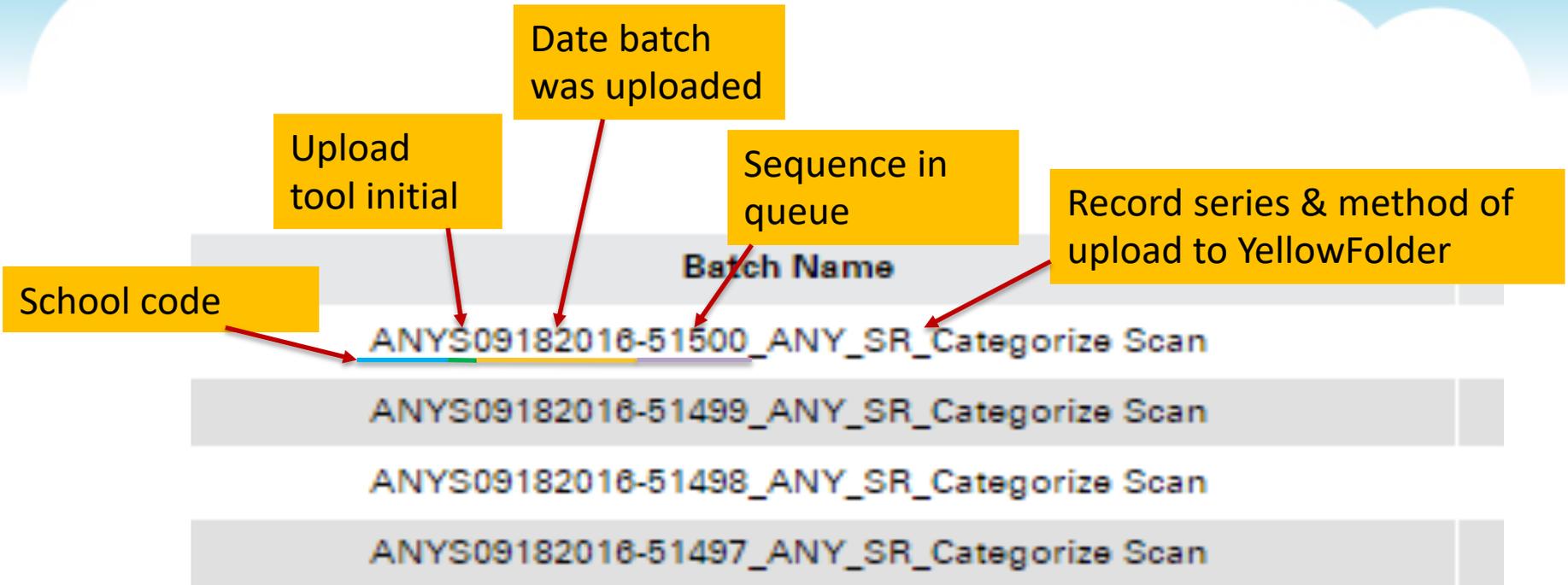
Method record was uploaded

- Status
- OCR Processing
  - In Processing
  - Analyzing
  - Filing
  - Completed

# Dashboard



Information found in Batch Names:



If you need to contact support to help with something pertaining to a specific batch you have uploaded, you will need the data starting with the school code through to the sequence number. (the portion of the Batch Name that is underlined in the above example)

# Dashboard



Three parts of the Dashboard:

1. Information Required
2. Verification Required
3. In process and completed

**Selecting Record Series**

Hi, Tester One (testerone@dispostable.com)

**A** **Information Required** Bulk Actions Student Records

<input type="checkbox"/>	Printed Date	Batch Name	Record Series	Status
<input type="checkbox"/>	07/13/2016	YJMP07132016-40484_YJM_Categorize Scan	--Please Select--	Information Required <input type="checkbox"/>
<input type="checkbox"/>	07/13/2016	YJMP07132016-40486_YJM_Categorize Scan	--Please Select--	Information Required <input type="checkbox"/>

Results 1 to 2 of 2 Page 1 of 1

**B** **Verification Required**

	Batch Name	Date	Record Series	First Name	Last Name	Identification Number	Status
<input type="checkbox"/> <input type="checkbox"/>	YJMP07122016-40407_YJM_SR_Categorize Scan	07/12/2016	Student Records	<input type="text"/>	<input type="text"/>	<input type="text"/>	Active <input type="checkbox"/>

Results 1 to 1 of 1 Page 1 of 1

**C** **In Process & Completed** From  To

Date	Batch Name	Record Series	Channel	Status
07/12/2016	YJMP07122016-40412_YJM_SPED_Categorize Scan	Special Education Records	Print	Completed
07/12/2016	YJMP07122016-40410_YJM_HR_Categorize Scan	Human Resource Records	Print	Completed

# Dashboard



## INFORMATION REQUIRED:

- IR is a queue where batches enter when a user has more than one record series.

A user can also preview the document by selecting the batch name.

Select record series here

The screenshot shows a dashboard with a table of batches. The table has columns for 'Printed Date', 'Batch Name', 'Record Series', and 'Status'. There are two rows of data. The first row has a checked checkbox, a date of 07/13/2016, a batch name 'YJMP07132016-40484\_YJM\_Categorize Scan', a dropdown menu for 'Record Series' with 'Student Records' selected, and a status of 'Information Required'. The second row has an unchecked checkbox, a date of 07/13/2016, a batch name 'YJMP07132016-40486\_YJM\_Categorize Scan', a dropdown menu for 'Record Series' with 'Student Records' selected, and a status of 'Information Required'. Below the table, there are 'Merge' and 'Save' buttons. A 'Bulk Actions' dropdown menu is also visible at the top right of the table, set to 'Student Records'.

	Printed Date	Batch Name	Record Series	Status
<input checked="" type="checkbox"/>	07/13/2016	YJMP07132016-40484_YJM_Categorize Scan	--Please Select-- Student Records	Information Required
<input type="checkbox"/>	07/13/2016	YJMP07132016-40486_YJM_Categorize Scan	--Please Select-- Student Records	Information Required

A user can update one batch at a time or multiple.  
\* Must check box before records will merge or save

Saving the update will move batch to the next stage for processing.

# Dashboard



After clicking save in the Information Required portion of the Dashboard, the batch(es) will move to In-Process.

Hi, Sharon McClain (smcclain@yellowfolder.com)

Dashboard

In Process & Completed From  To  Go

Date	Batch Name	Record Series	Channel	Status
08/25/2018	PNCP08252018-45268_PNC_HR_Categorize Scan	Human Resource Records	Print	In-Process

Results 1 to 1 of 1    Page 1 of 1

Updated Record Series  
from information required

In-Process

# Verification Required



Watch a live demonstration in the YellowFolder system of how to use the Verification Required Dashboard.

Download Scan & Upload Search Records Logout

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

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

Dashboard

Verification Required

		Batch Name	Date	Record Series	Person Data
<a href="#">EDIT</a>		ANTS06192017-227305_ANT_HR_Categorize Scan	06/19/2017	Human Resource Records	<input type="text" value="Search by First Name, Last Name or Identification Number"/>

Results 1 to 1 of 1 Page 1 of 1

# Dashboard



## VERIFICATION REQUIRED

- VR is a queue where batches enter when the system is unable to associate the files to a person from the CSV.

Dashboard

Verification Required

	Batch Name	Date	Record Series	Person Data
<a href="#">EDIT</a>	ANTS08192017-227305_ANT_HR_Categorize Scan	08/19/2017	Human Resource Records	<input type="text" value="Search by First Name, Last Name or Identification Number"/>

Results 1 to 1 of 1    Page 1 of 1

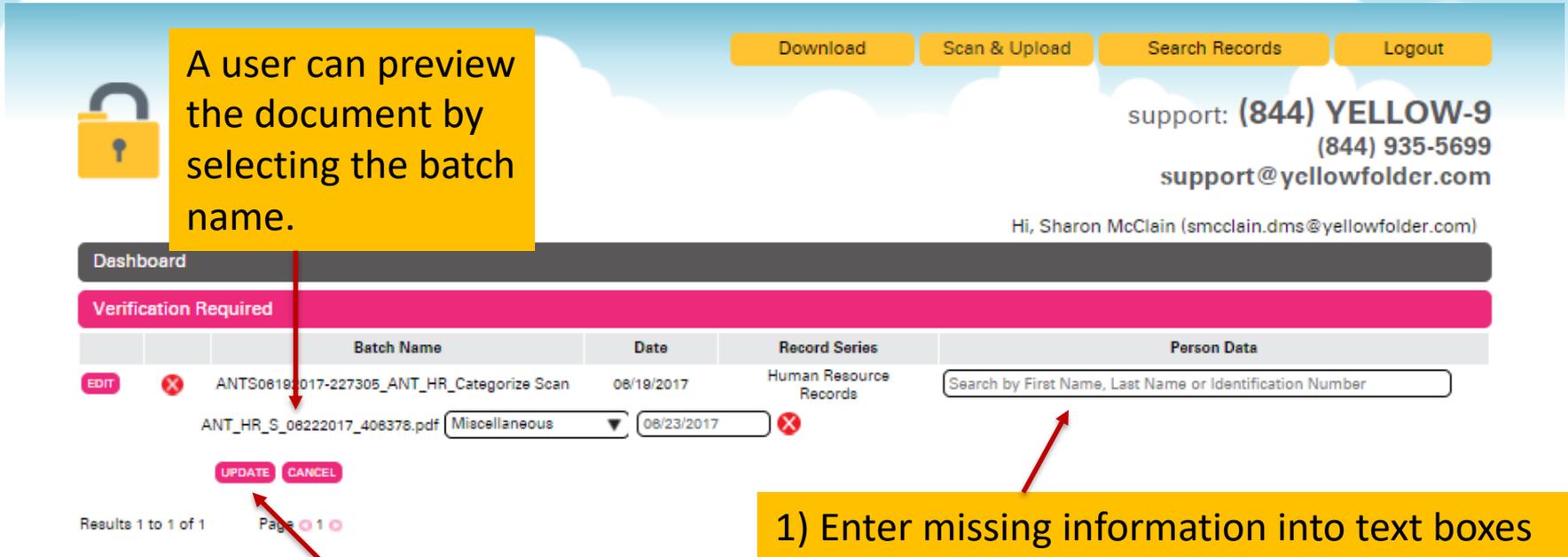
Click here to edit batch

Deletes batch

\* After clicking edit, an update button will appear and you will have the ability to write in the identifying information boxes

# Dashboard

## VERIFICATION REQUIRED Continued



Download Scan & Upload Search Records Logout

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

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

Dashboard

Verification Required

	Batch Name	Date	Record Series	Person Data
<a href="#">EDIT</a> <span>✖</span>	ANTS06181017-227305_ANT_HR_Categorize Scan	08/19/2017	Human Resource Records	<input type="text" value="Search by First Name, Last Name or Identification Number"/>
	ANT_HR_S_08222017_408378.pdf	<input type="text" value="Miscellaneous"/>	<input type="text" value="08/23/2017"/> <span>✖</span>	

[UPDATE](#) [CANCEL](#)

Results 1 to 1 of 1 Page 1 of 1

A user can preview the document by selecting the batch name.

1) Enter missing information into text boxes

2) Click the "Update" button to move batch straight to the digital file folder it belongs in after entering missing information

# Dashboard



## VERIFICATION REQUIRED Continued

Download Scan & Upload Search Records Logout

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

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

Dashboard

Verification Required

	Batch Name	Date	Record Series	Person Data
<span>EDIT</span> <span>✖</span>	ANTS06192017-227305_ANT_HR_Categorize Scan	08/19/2017	Human Resource Records	
	ANT_HR_S_08222017_408378.pdf	Application	08/01/2013	<span>✖</span>

UPDATE CANCEL

Results 1 to 1 of 1 Page 1 of 1

In Progress: Completed

Record Special Educ

Sanders, Lila-9876543614, Active  
Termination Date: None

Phillips, Lilly Lia-9876543566  
DOB: 12/23/1970 Status: Active  
Termination Date: None

Reese, Liliana Savanna-9876543583  
DOB: 1/9/1971 Status: Active  
Termination Date: None

**Sanders, Lila Nyla-9876543614**  
DOB: 2/9/1971 Status: Active  
Termination Date: None

ADD NEW PERSON

A drop down of current names will appear. Scroll through the names. If you see the person for which you are looking, click on his/her name. If you do not see the name for which you are looking, choose "Add New Person".

# Dashboard



## VERIFICATION REQUIRED Continued

Download Scan & Upload Search Records Logout

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

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

Dashboard

Verification Required

	Batch Name	Date	Record Series	Person Data
<a href="#">EDIT</a> 	ANTS06192017-227305_ANT_HR_Categorize Scan	06/19/2017	Human Resource Records	<input type="text" value="Search by First Name, Last Name or Identification Number"/>
	ANT_HR_S_08222017_408378.pdf <input type="text" value="Application"/>	<input type="text" value="08/01/2013"/> 		First Name : <input type="text"/> Last Name : <input type="text"/> Identification Number : <input type="text"/> Date of Birth: <input type="text"/> Campus: <input type="text"/> Status: <input type="text" value="Active"/>

[UPDATE](#) [CANCEL](#)

Results 1 to 1 of 1 Page 1 of 1

**Fill in the information required then choose "Add Person"**

# Dashboard



After clicking Update on the Verification Required Screen, the batch(es) will move back to the In-Process and Completion screen as Filing then Completed. Once it is in Completed status, it is searchable.

The screenshot shows the YellowFolder dashboard interface. At the top, there are navigation buttons: Download, Scan & Upload, Search Records, and Logout. The user is identified as Sharon McClain (smcclain@yellowfolder.com). Below the navigation is a 'Dashboard' section and an 'In Process & Completed' section with search filters (From, To, Go). A table displays the following data:

Date	Batch Name	Record Series	Channel	Status
08/29/2016	PNCP08292016-46240_PNC_Categorize Scan		Print	OCR Processing
08/25/2016	PNCP08252016-45268_PNC_HR_Categorize Scan	Human Resource Records	Print	Completed

Results 1 to 2 of 2    Page 1 of 1

A red arrow points from a yellow box labeled 'Completed status' to the 'Completed' cell in the table.

***Depending on whether or not you uploaded any documents in this training your dashboard could still be empty, however if you did upload documents you will see them here. Complete the final process by verifying any documents you have in Information or Verification Required.***

# 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 Additional Support/Training Needed



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