

YellowFolder Training Steps

Logging into YellowFolder

- At www.yellowfolder.com click the Login button in the upper right hand corner
- Enter email and password then click login
- If you can't remember your password, click the forgot password button.

Home Screen Dashboard in YellowFolder

This dashboard in YellowFolder gives a glance of what has been uploaded for the month, uploads needing information, and completed batches. Each number is hyperlinked, therefore clicking on them goes to the Verification Dashboard.

The screenshot shows the YellowFolder dashboard for user April Janeway. The top navigation bar includes links for File Uploads, Tools, Resources, and Logout. The user's name and email are displayed in the top right. The main dashboard area features a welcome message and four key metrics: 46 uploads this month, 0 uploads needing information, 1 upload needing verification, and 383 batches in complete status. Below these metrics are sections for Bookmarks, Recent Downloads, Shared documents, and Saved Searches. The Bookmarks and Recent Downloads sections indicate that the user has not bookmarked or downloaded any documents yet. The Shared documents section is divided into 'Shared with Me' and 'Shared by Me' categories. The Saved Searches and Checked Out Documents sections are currently empty.

Verification Dashboard:

When a file is uploaded the file will appear on the bottom half of the Verification Dashboard. The file will go through Processing, Analyzing, and then will either be moved to Verification Required portion at the top of the screen or complete status. Documents that go into complete status means YellowFolder has determined the filing folder (and/or subfolder) the document should be placed and has automatically filed the document. Those going into Verification Required need information in order to complete. It is necessary for the user to determine the location to file the document or enter the name of the person it should be filed under.

Dashboard

Verification Required

	Batch Name	Date	Record Series	Person Data
EDIT	LNCS01122019-1392982_LNC_SR_Categorize Scan	01/12/2019	Student Records	<input type="text" value="Search by First Name, Last Name or Identification Number"/>

Results 1 to 1 of 1 Page 1 of 1

In Process & Completed

Date	Batch Name	Record Series	Channel	Status
01/15/2019	LNCP01152019-1397282_LNC_Categorize Scan	Student Records	Print	Analyzing
01/15/2019	LNCD01152019-1397280_LNC_SR_Categorize Scan	Student Records	Droplet	Analyzing
01/12/2019	LNCS01122019-1392981_LNC_SR_Categorize Scan	Student Records	Scan	Completed
01/12/2019	LNCS01122019-1392980_LNC_SR_Categorize Scan	Student Records	Scan	Completed
01/12/2019	LNCS01122019-1392959_LNC_SR_Categorize Scan	Student Records	Scan	Completed
01/12/2019	LNCS01122019-1392958_LNC_SR_Categorize Scan	Student Records	Scan	Completed
01/12/2019	LNCS01122019-1392957_LNC_SR_Categorize Scan	Student Records	Scan	Completed
01/12/2019	LNCS01122019-1392956_LNC_SR_Categorize Scan	Student Records	Scan	Completed
01/12/2019	LNCS01122019-1392955_LNC_SR_Categorize Scan	Student Records	Scan	Completed
01/12/2019	LNCS01122019-1392954_LNC_SR_Categorize Scan	Student Records	Scan	Completed

Results 1 to 10 of 385 Page 1 of 1

Verification Required:

When verification is needed the file will appear in the top portion on the Verification Dashboard. Click **Edit** in order to verify the document's file location and file to appropriate person. The name of the file should be included in the batch name, however if uncertain open the file to ensure accuracy of filing. To enter a person, click Person Data and type it in the text bar. Highlight the name from the search results, then click update. If person is not listed, it is due to that person's name not being on the CSV. Enter all the missing data or wait until a few days until the person is available the list to complete the process.

Name of file should show in the batch name

Type in student name -IF you remember whom you uploaded - sometimes it will be up to 48 hours until verification shows up and depending on your file name you might not remember - I created a "Storage, Temp" student on each campus that you can place in order to view and then Move to correct student

Uploading Records in YellowFolder



Recommendation for files being uploaded

- Name files, include student ID in the naming of the file
- If identifying information (first name, last name and ID#) is not included on the document – create stickers and add to document prior to scanning/uploading
- If student ID is not on the document – it is acceptable to write it on the top prior to scanning/uploading

Scan & Upload

• Scan and Upload

Once File Uploads button is clicked, you will be directed to the Upload dashboard – from this screen click the **Scan & Upload** button. This tool assists in uploading documents already saved on the computer. Simply use the “Browse” to select files to upload. Click Upload button and the file will appear in the grey area of the screen.

One File – One Student

- Single documents – can be uploaded directly from grey area without using arrows to move over for manipulating the file, such as splitting or merging
- Split into multiple documents – use arrows to move document to left side to split file into as many files as needed, when finished select ALL and use arrows to move ALL split files back to grey area to Upload ALL at the same time using Save

One File – Multiple Students

- Must be split **AND** uploaded one at a time
- Split into multiple documents – use arrows to move document to left side to split file into as many files as needed, when finished select ONE file at a time and use arrows to move ONE split file at a time back to grey area to Upload ONE at a time using Save and Next

IF your computer has a scanner attached you will be able to select the scanner from the drop down and scan directly from scanner by clicking the Scan button

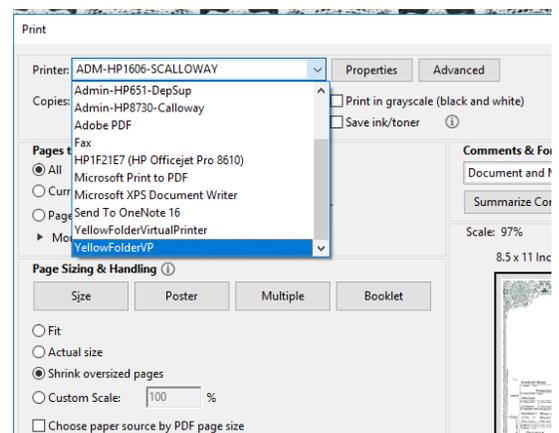
IF you have the file already in electronic format (either scanned from copy machine, downloaded from TEAMS, emailed from parent, etc) then you will use the Browse button and Upload button to bring file into YellowFolder

The movement arrows allow you to move an uploaded file from the uploaded area to the left. Moving to the this area allows the user to split a multiple student file or modify the upload to separate files

Once file is uploaded into YellowFolder you will see the file in this area.

• Virtual Printer

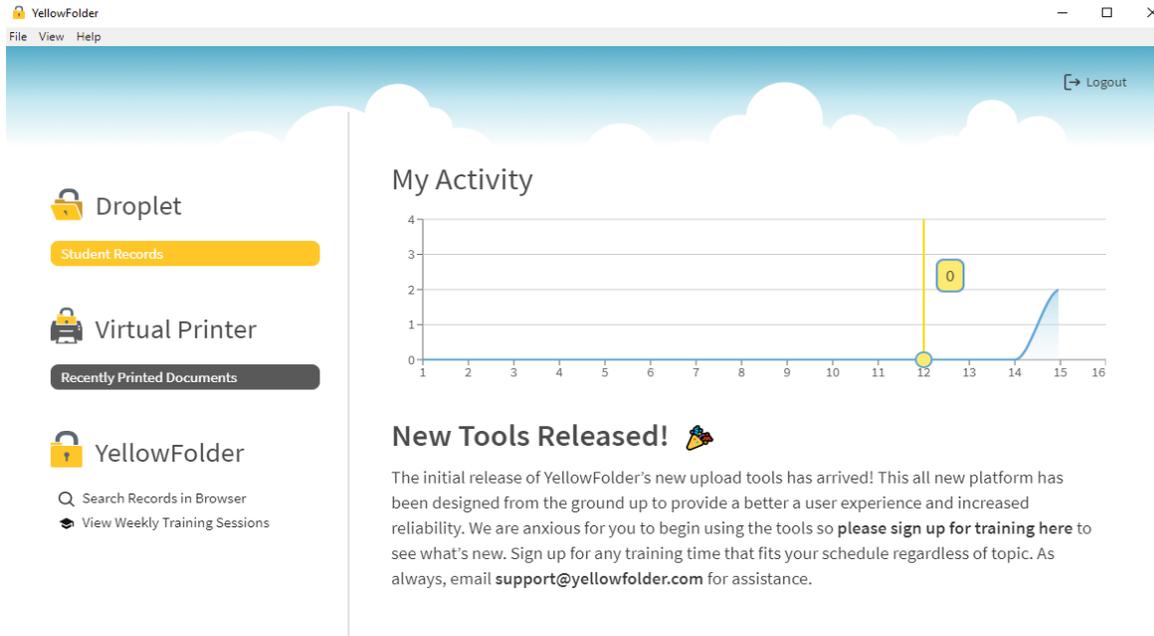
Virtual Printer allows the ability to open a file on the computer and “Print” directly into YellowFolder without using actual paper. Once the file is open, go to file – print. From the computer’s loaded printer option select *YellowFolderVP* from list. Then click Print button.



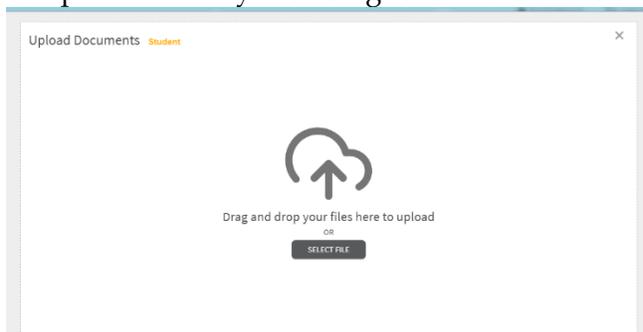
Find a list of documents recently printed to YellowFolder on Tool Dashboard under the Virtual Printer section when logged in.

- **Tools Dashboard - Droplet**

Tool Dashboard is separate from logging into YellowFolder. Keep this tool open during the day while uploading documents.



Droplet allows you to select NUMEROUS (or just one) electronic files at one time from your computer either by browsing to locate the files or dragging and dropping into the workspace.



Once files are selected or dropped, determine the Batch Type – carefully for files to be uploaded correctly.

IMPORTANT REMINDER: Pages of one file cannot contain different persons within one file, because the system does not separate pages out from one document.

Pending

1 files selected

Filename	Size	Progress	Status
Empris Mitchell.pdf	2 MB	0%	Pending

Batch Type



Single Person

- The documents in this batch must belong to **only one person**.
- Different document types must be a separate file in order to upload to the correct folder.
- The first page of each document determines the folder it will be filed in.
- The system does not split persons or documents from within a single file.



Multiple Persons

- The documents in this batch belong to **more than one person**.
- Each person with different document types must be a separate file to upload into the correct person and folder.
- The system does not split persons or documents from within a single file.

Once you select if the file or files are single person or multiple person – you will click submit. If you look on the Verification Dashboard in YellowFolder you will see the channel will say droplet.

Searching Records in YellowFolder

• Search Button Feature



Can be used to find all documents by a certain person, by typing in a first and last name or ID number, then click Search button. If searching for specific word along with a person's name or ID use parenthesis, like "234109 transcript". The search result list will contain any document with the content being searched. Once results appear, click "+" sign to see where the words searching for appear. Click "View" for the file to open. The do searching will appear in the content results.

Your Access : Archive Admin
 Your Title : RSA Title Show More

april

Order By

Campus Grade Name

SR

Active

Archive

Box Level

Click the plus sign to get a quick descript of what the record is

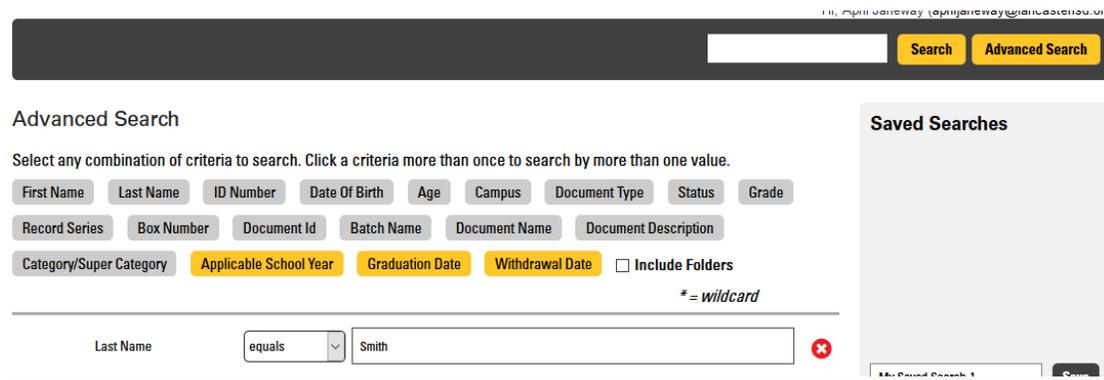
Content Results: "april"

SR

<input type="checkbox"/>	Score	Filename	Action	Doc Date
<input type="checkbox"/>	<div style="width: 100%; height: 10px; background-color: #ffc107;"></div>	Franklin,Juliet.53920.pdf	<input type="checkbox"/> View Download	
<input checked="" type="checkbox"/>	<div style="width: 100%; height: 10px; background-color: #ffc107;"></div>	47260courtpapers.pdf	<input type="checkbox"/> View Download	04/20/2017
<input checked="" type="checkbox"/>	<div style="width: 100%; height: 10px; background-color: #ffc107;"></div>	43397_ Immunizations.pdf	<input type="checkbox"/> View Download	
<input checked="" type="checkbox"/>	<div style="width: 100%; height: 10px; background-color: #ffc107;"></div>	Miscellaneous - Epps, Ca...	<input type="checkbox"/> View Download	12/10/2018

Click View to see the actual document

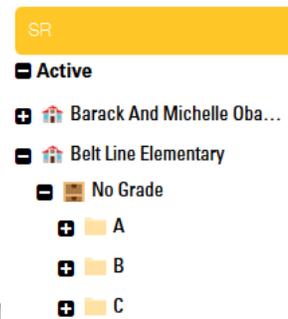
- **Advanced Search Feature**



The Advanced Search feature allows for selecting specific criteria and/or combination of criteria to narrow searches.

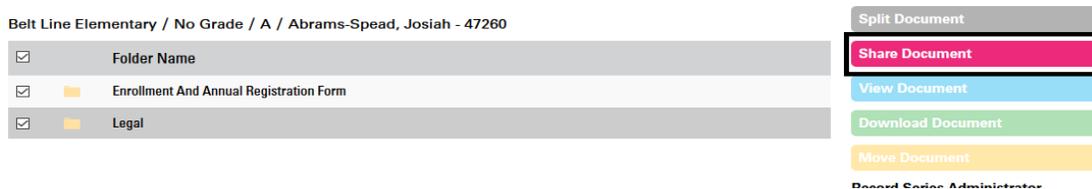
- **Tree Search Feature**

On the left side of the dashboard, the file tree search feature can be used by clicking the “+” next to Active Filing drawer, Archive Filing Drawer, and Box Level Filing Drawer. Then “+” signs can be used to drill down by campus and alpha letter. Due to the amount of clicking needed to find documents through the file tree, it is not the recommended search method.



Sharing Records using YellowFolder

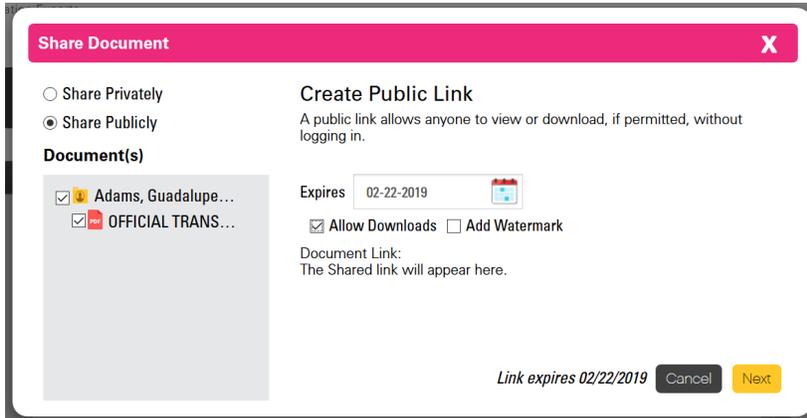
Records can be shared with others, including transfer student records, using YellowFolder’s secure and encrypted system. Locate the document by searching for it using advanced search or search feature.



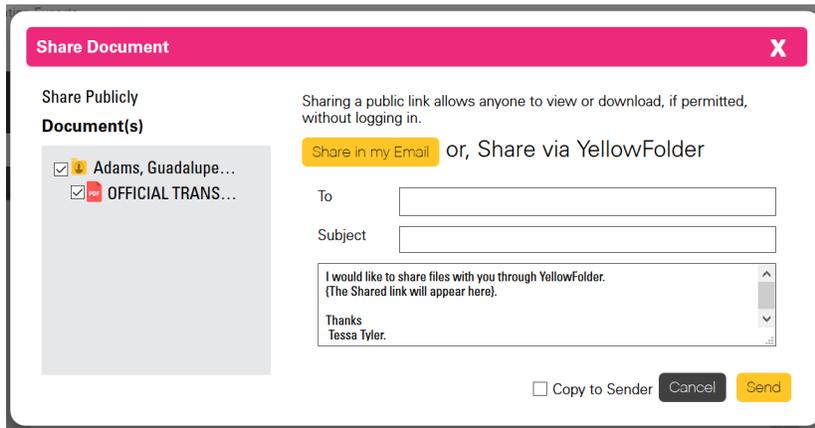
Once the document to be shared is located, click the Share Document button. The Share Document box will come up. Select share privately or share publicly radio button. Privately can only be shared with someone that has access to YellowFolder and has a log in. Publicly sends a link without having to log into YellowFolder, thus would be used for districts records are being sent to.

Change the Expires Date to the length of time desired for the email link to be active to the person receiving the records (default is one month). If the person will be allowed to download and print the document, along with viewing, click Allow Downloads box. Check Add

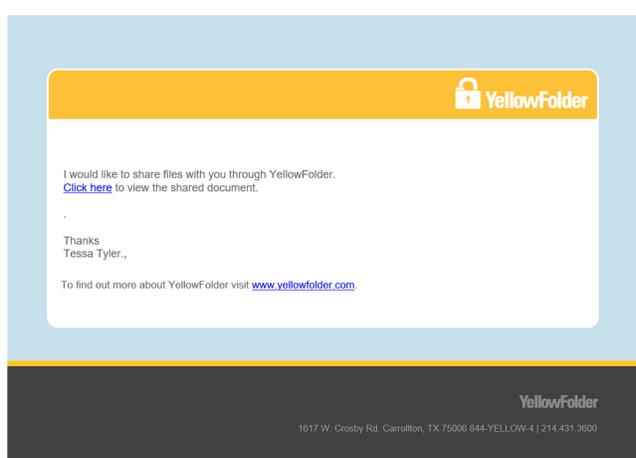
watermark the YellowFolder watermark is desired on the document. Click Next.



Complete the To and Subject. If a copy is desired, click Copy to Sender. Click Send. A notification that the link was sent successfully will appear and if Copy to Sender was checked a copy of the email.



A secure email will go to the email address you provided. The receiver will click the “click here” in the body of the email to receive the files.



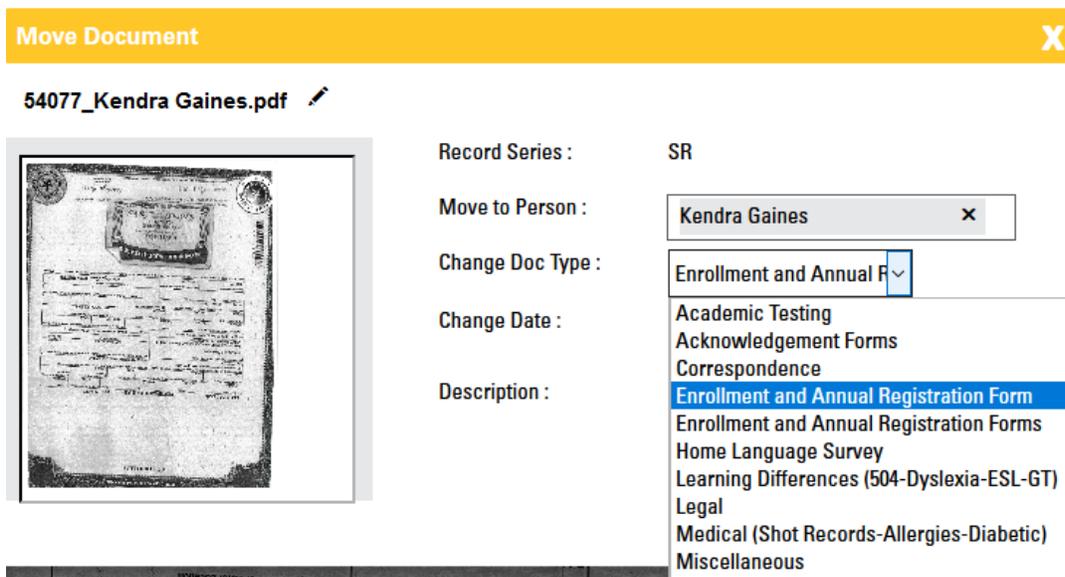
Moving Documents in YellowFolder

Documents can be moved from one folder to another. Locate the document by searching for it using advanced search or search feature... or even the tree search.



Once the document is located, click “View” to open. Once open click the yellow Move Document button on the right.

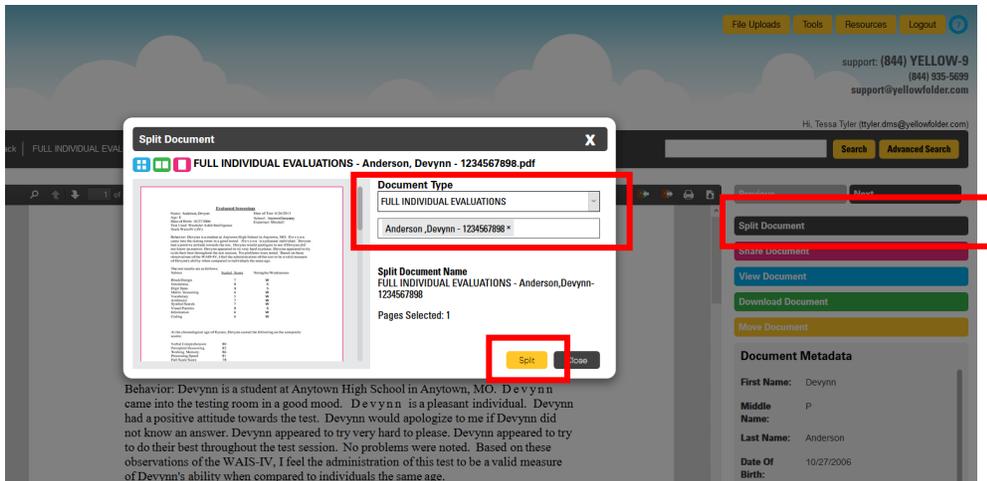
The move document box will open, click the X on current Person Name (if moving to another person) then search for correct person. Select the correct folder from the Change Doc Type dropdown to move the document in. At this time, a description can be added. To move the document, click Update.



Splitting Documents in YellowFolder

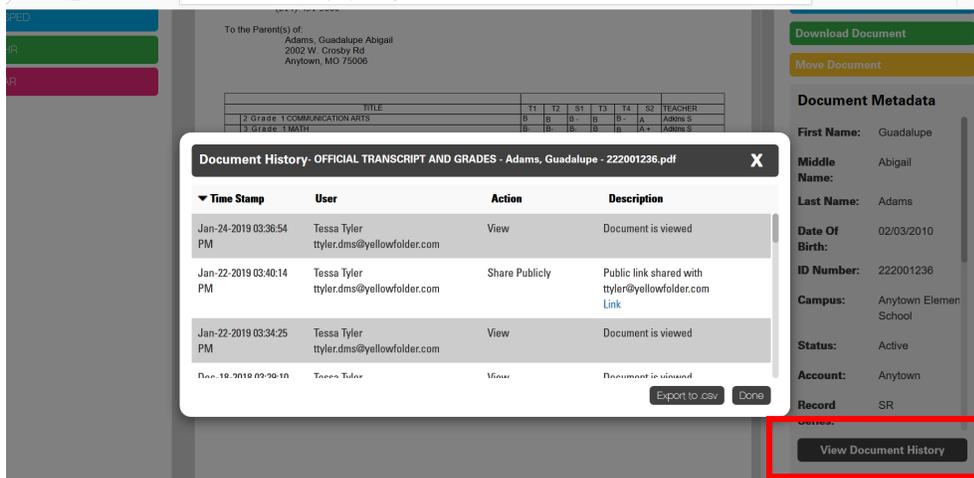
Documents can be split from one file to be saved in a folder. Locate the file by searching for it using advanced search or search feature... or even the tree search. Once the document is located, click “View” to open. Once open click the black Split Document button on the right.

The split document box will open, click on the pages within the document that need to be split from the current document. When pages are clicked, they will be framed in red. Once finished selecting the pages to be moved, use the Document Type drop down to select the folder the split pages should be filed in. If the split documents need to be split into another person’s record change the name by typing the last name in the field and when the name pulls up select it. Click the Split button to complete.



View Document History

Any time a file is “touched” in YellowFolder, shared via YellowFolder, moved to another folder, viewed... it is tracked in the Document History to provide an audit trail with a time stamp, user name, action taken and description. To view Document History, view a file and click View Document History button.



Training Options:

For additional training on specific features attend virtual live sessions by going to www.yellowfolder.com and clicking on the Training tab in the upper right corner to register. Also, training videos and PowerPoints are available using the Resources tab once logged into your YellowFolder System.