Becoming a Record Retrieval Phenom

Objective

YellowFolder

This course is designed to help the user become a master when it comes to searching documents and utilizing advanced features in the system that enhance the record retrieval experience. Users will be required to attend exactly six short live webinars and meet with a PNE twice over the duration of the course.

During the course, the user will learn how to…

- Search documents using a basic search, advanced search, and at the box level
- Share documents, split documents, and edit document metadata

Basic Search

YellowFolder

Basic Search is a general search feature that should be used when locating text within a document.

Use this search feature when trying to locate documents when you're unsure of the exact location.

Attend the Basic Search Live Webinar at
https://www.yellowfolder.com/weeklytraining/index.html

Advanced Search

Advanced Search is a search feature that allows you to narrow your results for documents by choosing various criteria.

Advanced Search <u>should be used most</u> frequently when searching for active or archive documents as it is the easiest and quickest way to search.

Attend the Advanced Search Live Webinar at
https://www.yellowfolder.com/weeklytraining/index.html

Box Search

Box Search is used when documents have been uploaded at the box level.

Box level includes people who have never been on the CSV and do not have a file structure in the system, as they were inactive staff/students when boxes were uploaded into the system.

Attend the Box Search Live Webinar at
https://www.yellowfolder.com/weeklytraining/index.html

YellowFolder

Your Access : Archive Admin
Your Title : User

Show More

Order By
☑ Campus ☐ Name

SR

➕ Active
➕ Archive
Box Level

Checkpoint 1

Schedule individual time with a PNE to share what you have learned about searching.

1. Share with your PNE the search method that works best for you and explain why.
2. Demonstrate the three different ways to search for a document.
3. Locate an active student/employee and an archive student/employee for your PNE in the system. Share the difference between active and archive with your PNE.
4. Show your PNE where the record request form is located on your computer and explain when the record request form would be used.

Sharing Documents

The Share Documents tab should be used when a user needs to share a record electronically with another YellowFolder user or an individual who does not have YellowFolder.

Attend the Sharing Documents Live Webinar at https://www.yellowfolder.com/weeklytraining/index.html

Split Document

Share Document

View Document

Download Document

Move Document

Splitting Documents

YellowFolder

The Split Documents tab should be used when a user wants to split apart a record that has multiple pages.

This feature allows the user to specify the new folder that the split documents should be filed in.

Split Document

Share Document

View Document

Download Document
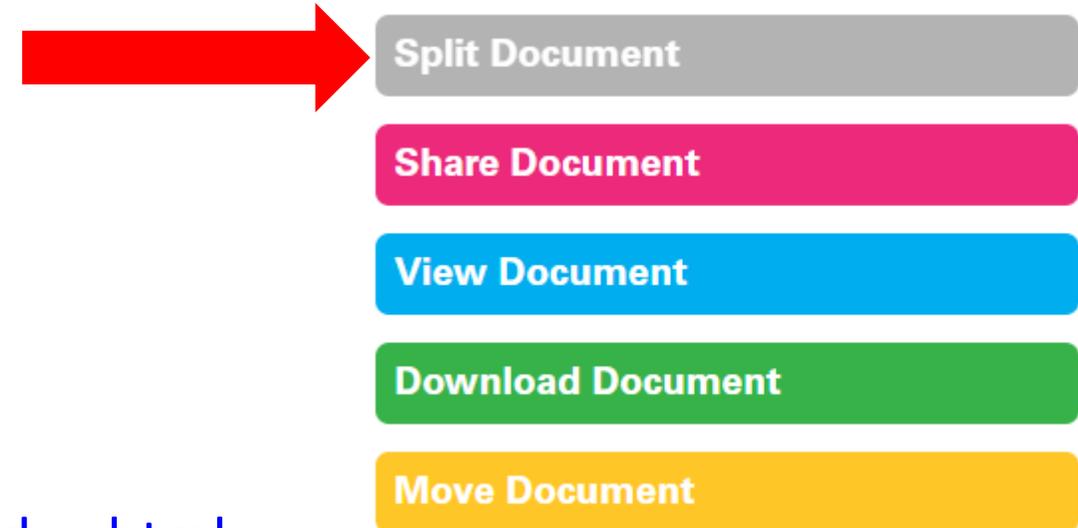
Move Document

Attend the Splitting Documents Live Webinar at
https://www.yellowfolder.com/weeklytraining/index.html

Move Document

Move Document is a tool that allows you to move documents from one folder to another, from one person to another, change the document date, or add a description of the document.

Move Document should be used when a document has been placed in the wrong document folder or in the wrong person folder, when you want to change the date associated with the document, or when you want to add a description of the document.

Split Document

Share Document

View Document

Download Document

Move Document

Attend the Move Document Live Webinar at

https://www.yellowfolder.com/weeklytraining/index.html

Checkpoint 2

YellowFolder

Schedule individual time with a PNE to share what you have learned about sharing, splitting, and editing document metadata.

1. Share 2 records with a private individual (another YellowFolder user).
2. Share 2 records with a public individual.
3. Share with your PNE - two different doc types for two different people. Explain the difference between sharing publicly and sharing privately. How do you terminate a link that you have previously shared?
4. Explain when you might use the Splitting Documents tab with the PNE.
5. Pull up a document in the system and click on the Move Document tab. Share the different pieces of metadata that can be changed using this feature.

Support/Resources

YellowFolder

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

Course Completion Submission for Certificate

Fill out the Course Completion Submission form and submit it to awatts@yellowfolder.com to obtain the course certificate.