



YellowFolder

The Education Documentation Experts

Welcome to Scan and Upload 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.***

Seven Simple Questions



1. Do you know how to print a document?
2. Do you know how to scan a document?
3. Have you ever attached a document to an email?
4. Have you ever dragged and dropped a document into a folder on your computer?
5. Have you ever searched through a file tree on your computer?
6. Have you ever searched in Google?
7. Have you ever refined a search on Amazon?

If you can do these you can use YellowFolder like a pro!

Let's rate your computer skills, how savvy are you with technology?

Uploading Documents

There are four ways to upload documents to YellowFolder:

- 1) Using the Virtual Printer
- 2) Using the Droplet
- 3) **Using Scan**
- 4) **Using Upload**

Which do I use?

It depends on what you are uploading and personal preference...

Scan and Upload - Uploading Documents



Watch a live demonstration in the YellowFolder system of how to use the **SCAN TOOL**.

YellowFolder
Education's Online Filing Cabinet

Navigation: **Scan & Upload** | Download | Resources | Logout | ?

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

Hi Candice Earnest (cearnest.dms@yellowfolder.com)

Your Access : Archive Admin, Box Level [Show](#)

Welcome, Candice Earnest

Order By: Campus Name

SR [Hide](#)

- Active
- Archive
- Box Level

SPED [Show](#)

HR [Show](#)

AR [Show](#)

| | | | |
|--------------------|-----------------------------|------------------------------|----------------------------|
| 2 | 3 | 12 | 1642 |
| Uploads In Process | Uploads Needing Information | Uploads Needing Verification | Batches in Complete Status |

Bookmarks

- INDIVIDUAL EDUCATION PLANS - Leek, Becky - 1234568175.pdf
- BENEFITS AND BENEFICIARY DESIGNATION - Keller, Sergio - 9876543448.pdf
- EOY 21-22 OFFICIAL TRANSCRIPT AND GRADES - Kane, Mike - 222001446 nrf

Recent Downloads

- BOY Testing - Cantrell, Pablo - 222001289.pdf
- Dental.pdf
- BENEFITS AND BENEFICIARY DESIGNATION - Banks, Gabriel - 9876543230.pdf

Saved Searches

- Jon Davis
- Paul Anderson
- Budget

Checked Out Documents [View All](#)

- OFFICIAL TRANSCRIPT AND GRADES - Greene, Joni - 222001381.pdf

Uploading via SCAN TOOL



- Scan & Upload
- Download
- Resources
- Logout
- ?

Choose Scan & Upload

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

Hi Candice Earnest (cearnest.dms@yellowfolder.com)

Your Access : Archive Admin, Box Level
Show

Welcome, Candice Earnest

Search

Advanced Search

Order By

- Campus
- Name

SR Hide

- Active
- Archive
- Box Level

SPED Show

HR Show

AR Show

| | | | |
|--------------------------------|---|---|---|
| 2 Uploads In Process | 3 Uploads Needing Information | 10 Uploads Needing Verification | 1636 Batches in Complete Status |
|--------------------------------|---|---|---|

Bookmarks

- BENEFITS AND BENEFICIARY DESIGNATION - Keller, Sergio - 9876543448.pdf
- EOY 21-22 OFFICIAL TRANSCRIPT AND GRADES - Kane, Mike - 222001446.pdf

Recent Downloads

- BOY Testing - Cantrell, Pablo - 222001289.pdf
- Dental.pdf
- BENEFITS AND BENEFICIARY DESIGNATION - Banks, Gabriel - 9876543230.pdf

Saved Searches

- Jon Davis
- Paul Anderson
- Budget

Checked Out Documents

[View All](#)

- OFFICIAL TRANSCRIPT AND GRADES - Greene, Joni - 222001381.pdf

Uploading via SCAN TOOL

Scan and Upload



Scan Files

Scan 

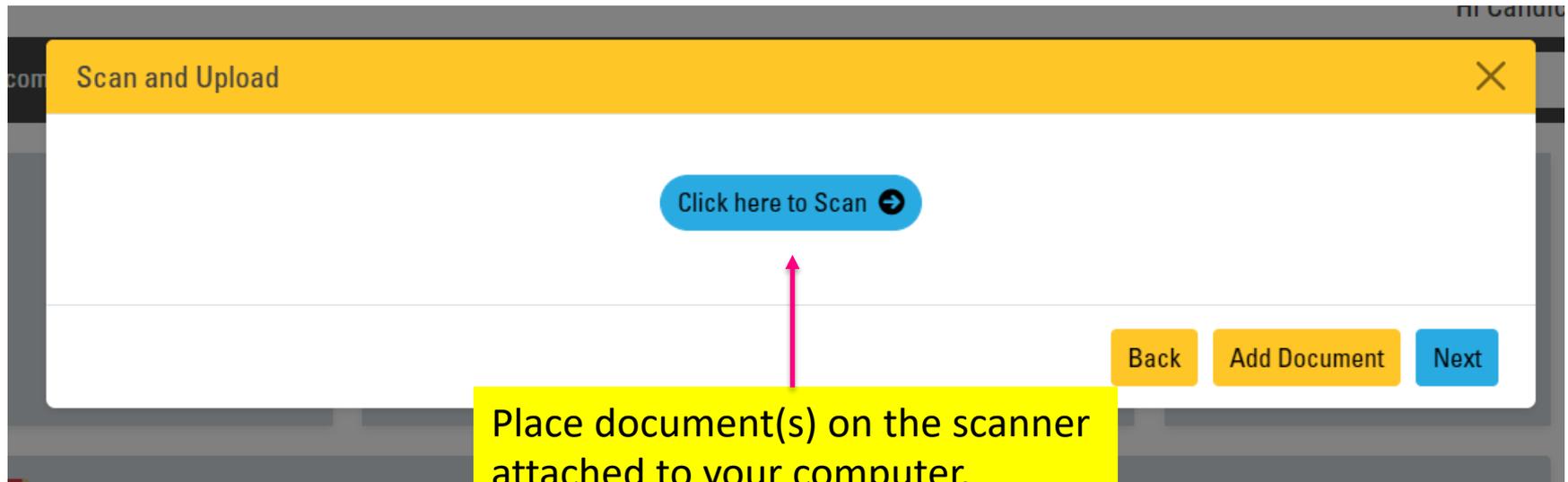
Upload Files

Add Document 

Close

Click "Scan" under the "Scan Files" option.

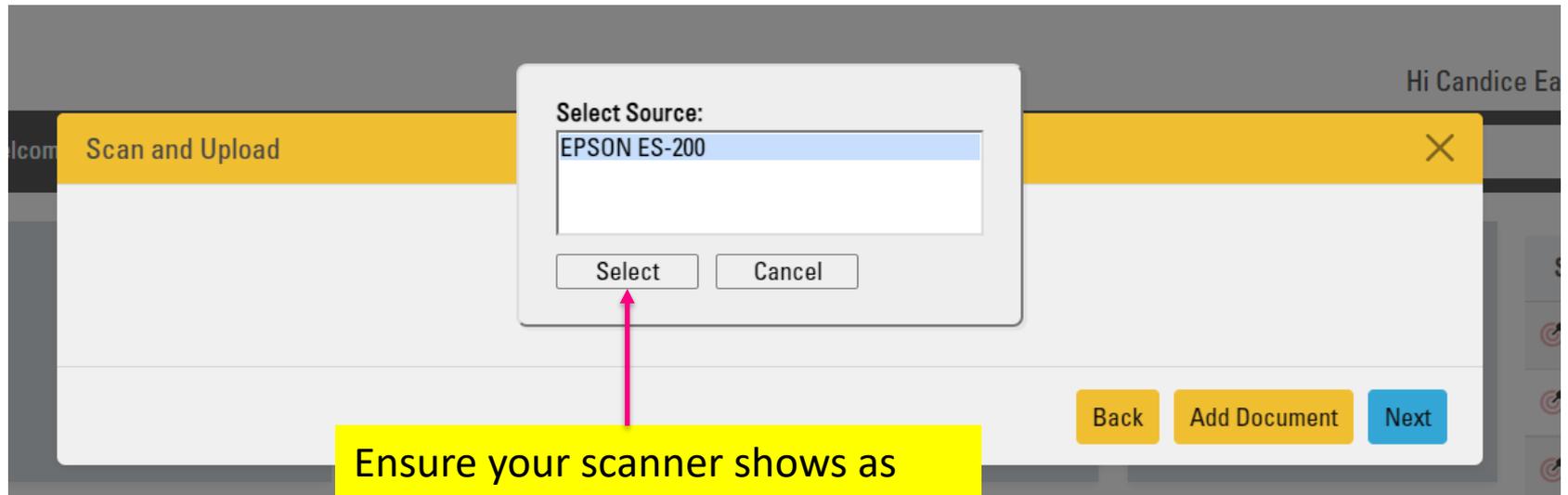
Uploading via SCAN TOOL



Place document(s) on the scanner attached to your computer.

Click “Click here to Scan” and system will begin scanning documents.

Uploading via SCAN TOOL



Ensure your scanner shows as
the Select Source:

Click "Select"

Uploading via SCAN TOOL



The screenshot shows a 'Scan and Upload' window with a yellow header and a close button. Below the header is a blue button that says 'Click here to Scan'. The main area contains a list of three scanned documents, each with a thumbnail, title, page count, and a pink warning banner. The documents are:

- IEPs - Jackson, Amado - 1234568127 (14 Page(s))
- FIE - Jackson, Amado - 1234568127 (4 Page(s))
- Speech Evaluation - Jackson, Amado - 1234568127 (2 Page(s))

At the bottom right of the window are three buttons: 'Back', 'Add Document', and 'Next'. A pink arrow points from the 'Next' button to the pink warning banner of the third document.

Documents will automatically appear in Document area.

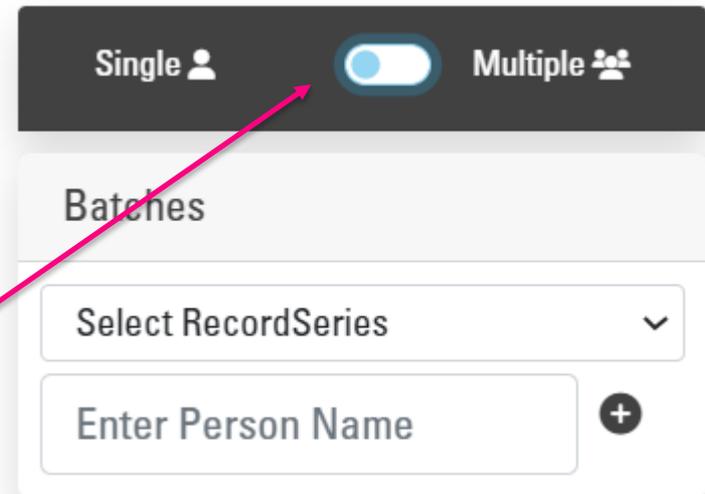
Continue scanning and adding your documents until all files needing to be uploaded have been selected and added.

Click "Next."

Uploading via SCAN TOOL

If uploading records that belong to the same person, keep the batch option on Single.

If uploading records for different persons, select the Multiple batch option.



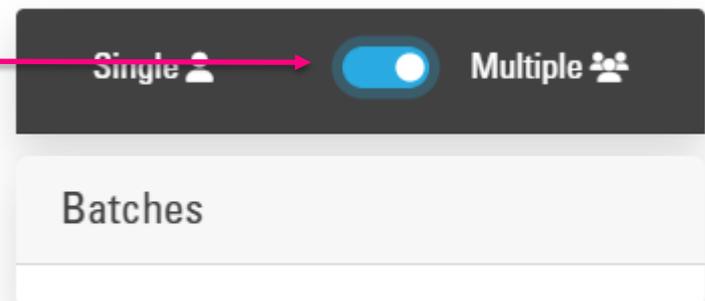
Single  Multiple 

Batches

Select RecordSeries 

Enter Person Name 

A pink arrow points from the text box to the 'Multiple' toggle switch.



Single  Multiple 

Batches

A pink arrow points from the text box to the 'Multiple' toggle switch.

Uploading via SCAN TOOL



For each batch being uploaded to a Single person, select the Record Series.

If you want to edit the file name of any batches, click the pencil icon, update the file name in the text field, and click the checkbox to save the file name.

Batch



Single Multiple

Batches

Special Education Records

Search by First Name, Last Name

Document Viewer and Editor Add Empty Document

1 FIE - Jackson, Amado - 1234568127 Select All 29 days left

Select DocType

2 Speech Evaluation - Jackson, Amado - 1234568127 Select All 29 days left

Select DocType

- Back
- Upload
- Upload & Next
- Cancel

Uploading via SCAN TOOL



Batch Creation



Single Multiple

Batches

Special Education Records

Search by First Name, Last Name

Document Viewer and Editor

Add Empty Document

1 FIE - Jackson, Amado - 1234568127 Select All 29 days left

Select DocType

2 Jackson, Amado - 1234568127 Select All 29 days left

Select DocType

If you want to assign person and doctype data, select/assign that information where prompted. After all data has been updated, click the "Select All" checkbox in each batch panel and click the grey left arrow.

If you want the system to auto-file, click the "Select All" checkbox in each batch panel and click the grey left arrow.

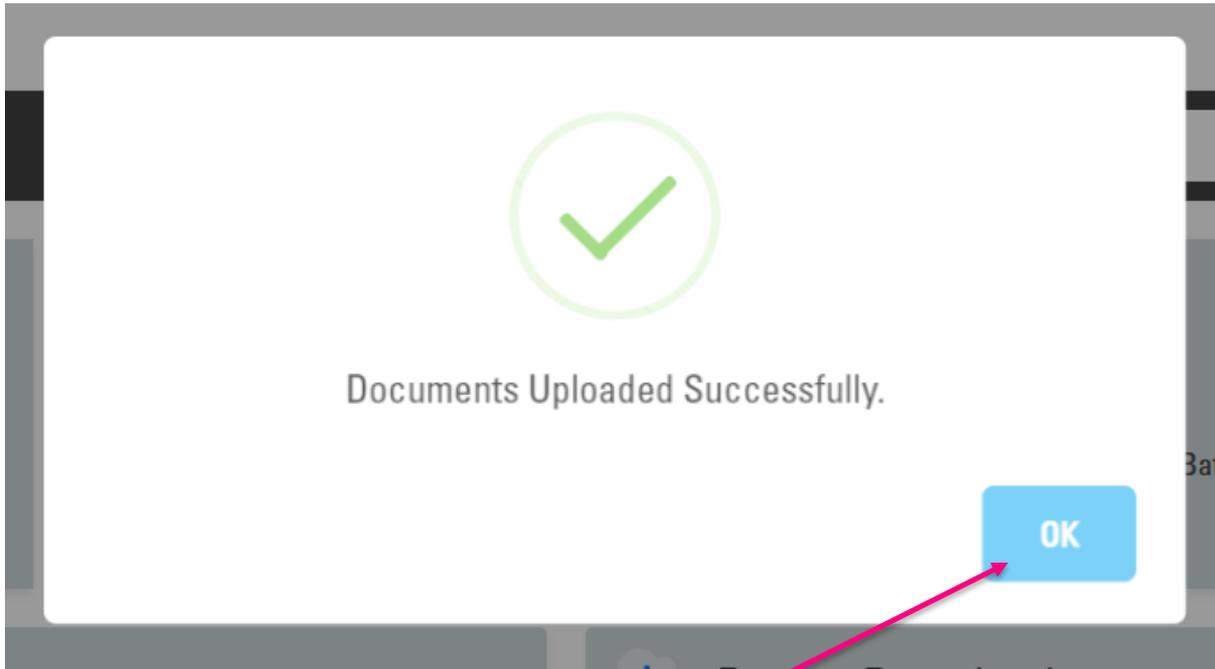
Back Upload Upload & Next Cancel

Uploading via SCAN TOOL



Once all items needing to be uploaded are on the left side of the panel, select Upload (if finished), or Upload & Next to stay in the tool to continue uploading.

Uploading via SCAN TOOL



The system will notify you once all documents have been uploaded successfully. Click "OK."

Uploading via SCAN TOOL



Your turn to try using your attached scanner to upload a document. If you do not wish to complete the entire process at least walk through the steps to ensure you understand the process. Do **NOT** use these method unless your scanner is directly attached to your computer.

Scan and Upload - Uploading Documents



Watch a live demonstration in the YellowFolder system of how to use the **UPLOAD TOOL**.

The screenshot shows the YellowFolder web interface. At the top left is the YellowFolder logo with the tagline "Education's Online Filing Cabinet". To the right of the logo is a navigation bar with buttons for "Scan & Upload", "Download", "Resources", and "Logout". The "Scan & Upload" button is circled in pink. Below the navigation bar, there is a search bar and a "Search" button. On the right side, there is contact information: "support: (844) YELLOW-9 (844) 935-5699 support@yellowfolder.com" and a personalized greeting: "Hi Candice Earnest (cearnest.dms@yellowfolder.com)".

The main content area is divided into several sections:

- Your Access:** Archive Admin, Box Level (Show)
- Order By:** Campus (selected), Name
- SR:** Hide
- SPED:** Show
- HR:** Show
- AR:** Show

The central dashboard displays four key metrics:

- 2 Uploads In Process
- 3 Uploads Needing Information
- 12 Uploads Needing Verification
- 1642 Batches in Complete Status

Below these metrics are two panels:

- Bookmarks:** A list of bookmarked documents including "INDIVIDUAL EDUCATION PLANS - Leek, Becky - 1234568175.pdf", "BENEFITS AND BENEFICIARY DESIGNATION - Keller, Sergio - 9876543448.pdf", and "EOY 21-22 OFFICIAL TRANSCRIPT AND GRADES - Kane, Mike - 222001446.pdf".
- Recent Downloads:** A list of recently downloaded documents including "BOY Testing - Cantrell, Pablo - 222001289.pdf", "Dental.pdf", and "BENEFITS AND BENEFICIARY DESIGNATION - Banks, Gabriel - 9876543230.pdf".

On the right side, there are two additional panels:

- Saved Searches:** A list of saved searches including "Jon Davis", "Paul Anderson", and "Budget".
- Checked Out Documents:** A list of checked out documents including "OFFICIAL TRANSCRIPT AND GRADES - Greene, Joni - 222001381.pdf".

Uploading via UPLOAD TOOL



- Scan & Upload
- Download
- Resources
- Logout
- ?

Choose Scan & Upload

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

Hi Candice Earnest (cearnest.dms@yellowfolder.com)

Your Access : Archive Admin, Box Level
Show

Welcome, Candice Earnest

Search

Advanced Search

Order By

- Campus
- Name

SR Hide

- Active
- Archive
- Box Level

SPED Show

HR Show

AR Show

| | | | |
|--------------------------------|---|---|---|
| 2 Uploads In Process | 3 Uploads Needing Information | 10 Uploads Needing Verification | 1636 Batches in Complete Status |
|--------------------------------|---|---|---|

Bookmarks

- BENEFITS AND BENEFICIARY DESIGNATION - Keller, Sergio - 9876543448.pdf
- EOY 21-22 OFFICIAL TRANSCRIPT AND GRADES - Kane, Mike - 222001446.pdf

Recent Downloads

- BOY Testing - Cantrell, Pablo - 222001289.pdf
- Dental.pdf
- BENEFITS AND BENEFICIARY DESIGNATION - Banks, Gabriel - 9876543230.pdf

Saved Searches

- Jon Davis
- Paul Anderson
- Budget

Checked Out Documents

[View All](#)

- OFFICIAL TRANSCRIPT AND GRADES - Greene, Joni - 222001381.pdf

Uploading via UPLOAD TOOL



Scan and Upload



Scan Files

Scan 

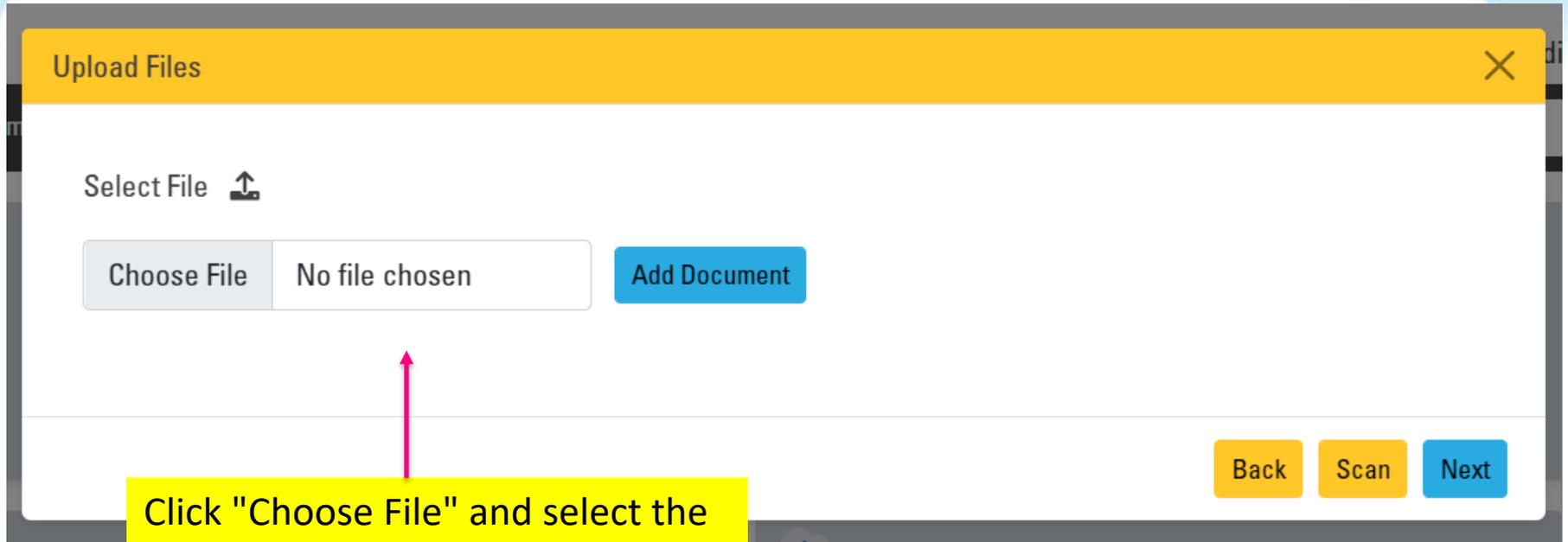
Upload Files

Add Document 

Close

Click “Add Document” under the “Upload Files” option.

Uploading via UPLOAD TOOL



Click "Choose File" and select the file you need to upload from the appropriate location on your device. Click "Add Document."

Uploading via UPLOAD TOOL



Upload Files

Select File

Choose File No file chosen Add Document

Speech Evaluation - Jackson, Amado - 1234568127
2 Page(s)
This document will automatically be removed in 30 days if left unprocessed

Physician Reports - Jackson, Amado - 1234568127
2 Page(s)
This document will automatically be removed in 30 days if left unprocessed

Back Scan Next

Documents will automatically appear in Document area.

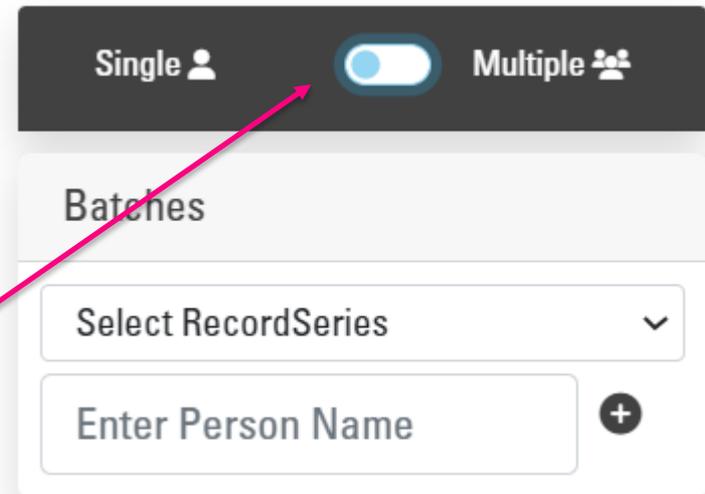
Continue choosing your necessary files and adding your documents until all files needing to be uploaded have been selected and added.

Click “Next.”

Uploading via UPLOAD TOOL

If uploading records that belong to the same person, keep the batch option on Single.

If uploading records for different persons, select the Multiple batch option.



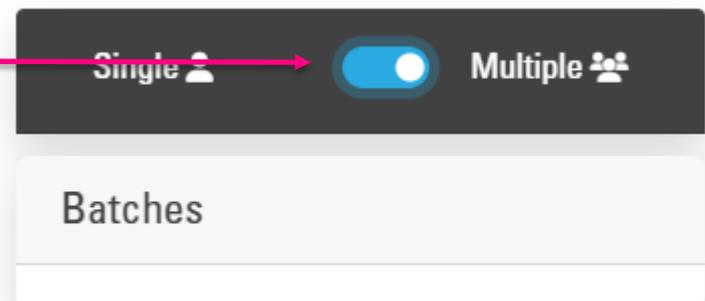
Single  Multiple 

Batches

Select RecordSeries 

Enter Person Name 

A pink arrow points from the text box to the 'Multiple' toggle.



Single  Multiple 

Batches

A pink arrow points from the text box to the 'Single' toggle.

Uploading via UPLOAD TOOL



For each batch being uploaded to a Single person, select the Record Series.

If you want to edit the file name of any batches, click the pencil icon, update the file name in the text field, and click the checkbox to save the file name.

Batch



Single Multiple

Batches

Special Education Records

Search by First Name, Last Name

Document Viewer and Editor Add Empty Document

1 FIE - Jackson, Amado - 1234568127 Select All 29 days left

Select DocType

2 Speech Evaluation - Jackson, Amado - 1234568127 Select All 29 days left

Select DocType

- Back
- Upload
- Upload & Next
- Cancel

Uploading via UPLOAD TOOL



Batch Creation



Single Multiple

Batches

Special Education Records

Search by First Name, Last Name

Document Viewer and Editor

Add Empty Document

1 FIE - Jackson, Amado - 1234568127 Select All 29 days left

Select DocType

2 Jackson, Amado - 1234568127 Select All 29 days left

Select DocType

If you want to assign person and doctype data, select/assign that information where prompted. After all data has been updated, click the "Select All" checkbox in each batch panel and click the grey left arrow.

If you want the system to auto-file, click the "Select All" checkbox in each batch panel and click the grey left arrow.

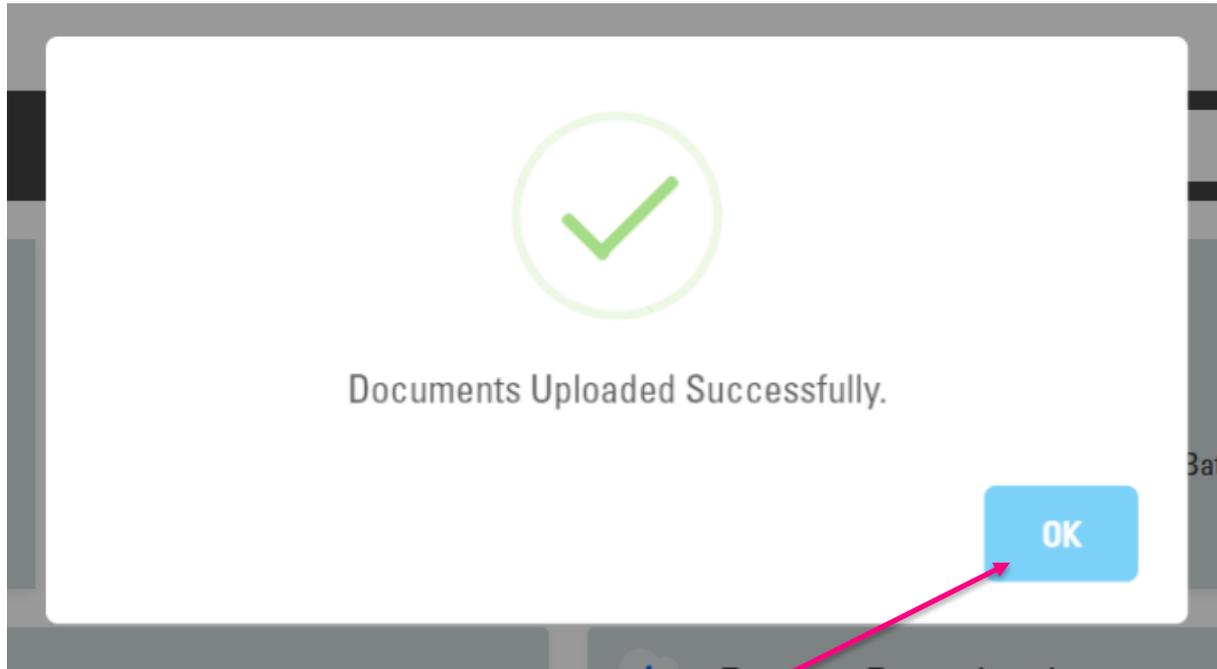
Back Upload Upload & Next Cancel

Uploading via UPLOAD TOOL



Once all items needing to be uploaded are on the left side of the panel, select Upload (if finished), or Upload & Next to stay in the tool to continue uploading.

Uploading via UPLOAD TOOL



The system will notify you once all documents have been uploaded successfully. Click "OK."

Uploading via UPLOAD TOOL



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

Uploading Options to Split and Merge



YellowFolder

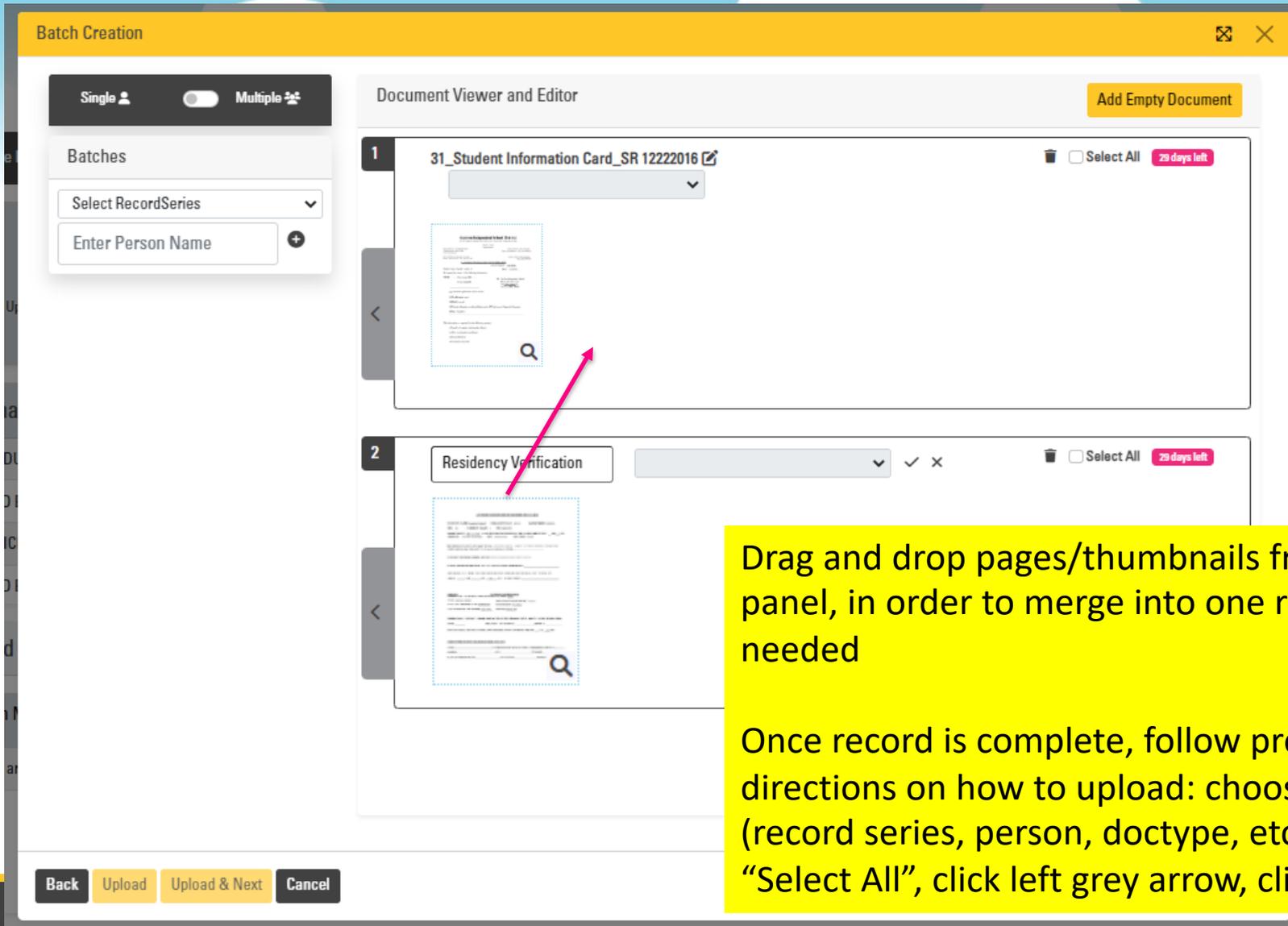
TO MERGE:

1. Click Scan & Upload
2. Add documents as detailed in the Scan or Upload directions - Click “Next”
3. Each document will appear in its own panel
4. Drag and drop pages/thumbnails from panel to panel, in order to merge into one record as needed
5. Once record is complete, follow previous directions on how to upload: choose options (record series, person, doctype, etc.), click “Select All”, click left grey arrow, click “Upload”

TO SPLIT:

1. Click Scan & Upload
2. Add documents as detailed in the Scan or Upload directions - Click “Next”
3. Add as many empty panels as needed to split appropriately, by clicking the “Add Empty Document” button in the top right corner of the tool
4. Move pages/thumbnails from the initial record to the empty panels
5. Once the record in each panel is complete, follow previous directions on how to upload: choose options (record series, person, doctype, etc.), click “Select All”, click left grey arrow, click “Upload”

MERGING



Batch Creation

Single Multiple

Batches

Select RecordSeries

Enter Person Name

Document Viewer and Editor

Add Empty Document

1 31_Student Information Card_SR 12222016 Select All 29 days left

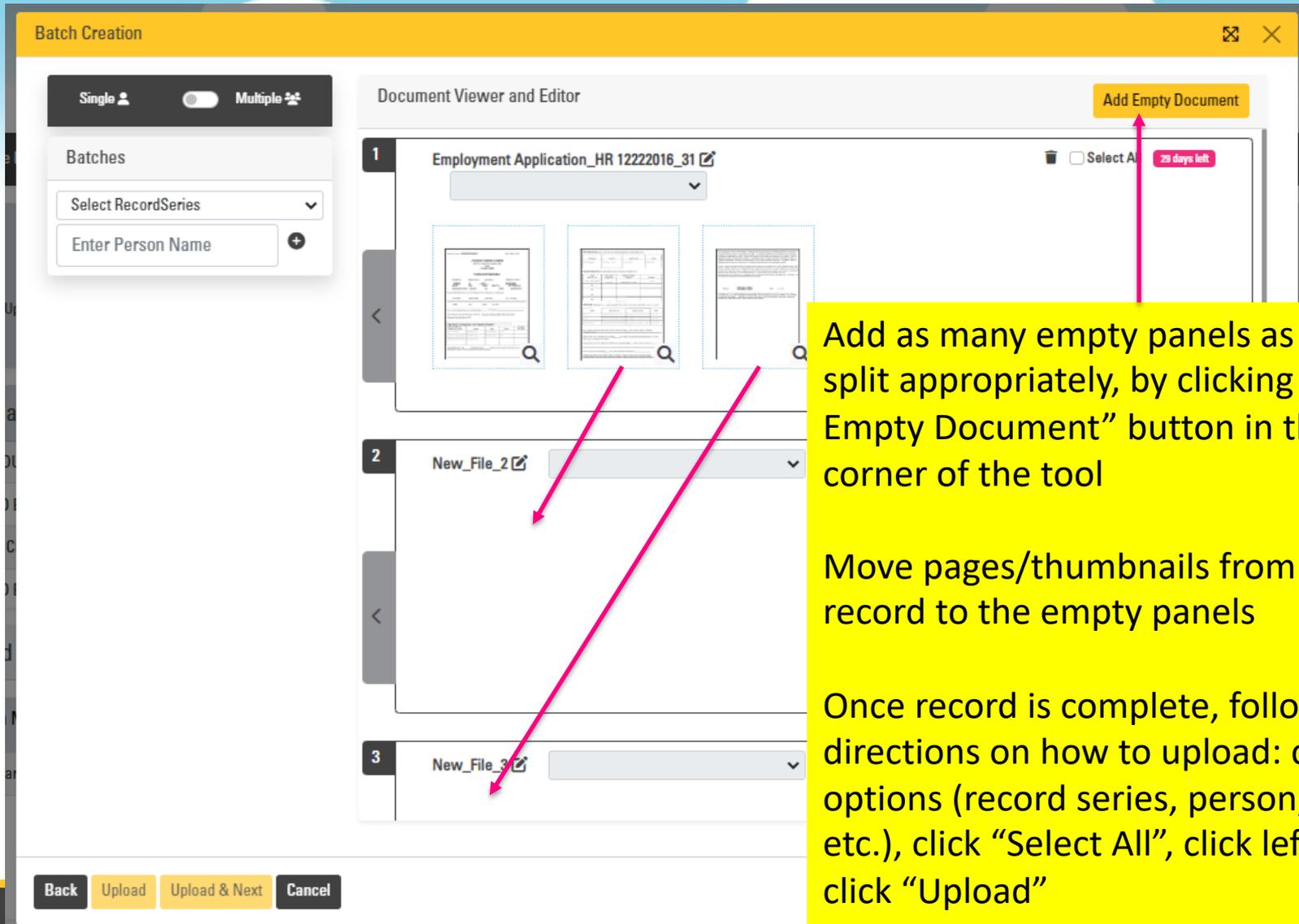
2 Residency Verification Select All 29 days left

Back Upload Upload & Next Cancel

Drag and drop pages/thumbnails from panel to panel, in order to merge into one record as needed

Once record is complete, follow previous directions on how to upload: choose options (record series, person, doctype, etc.), click "Select All", click left grey arrow, click "Upload"

SPLITTING



Batch Creation

Single Multiple

Batches

Select RecordSeries

Enter Person Name

Document Viewer and Editor

Add Empty Document

1 Employment Application_HR 12222016_31

2 New_File_2

3 New_File_3

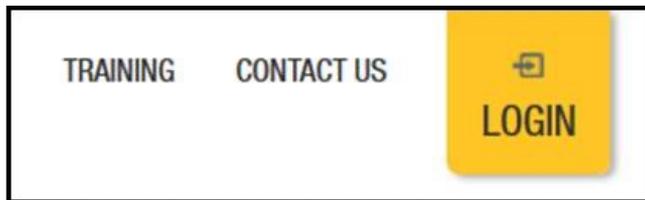
Back Upload Upload & Next Cancel

Add as many empty panels as needed to split appropriately, by clicking the “Add Empty Document” button in the top right corner of the tool

Move pages/thumbnails from the initial record to the empty panels

Once record is complete, follow previous directions on how to upload: choose options (record series, person, doctype, etc.), click “Select All”, click left grey arrow, click “Upload”

Any Questions or Additional Support/Training Needed



To learn more about the features in YellowFolder, go to 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

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

PNE Contact Information



- ▶ PNE- PNE Name

- ▶ Xxx-xx-xxxx

- ▶ xxx@yellowfolder.com

- ▶ Address:

- P.O. Box 3068

- McKinney, TX 75070