



# YellowFolder

The Education Documentation Experts

## Welcome to Droplet 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

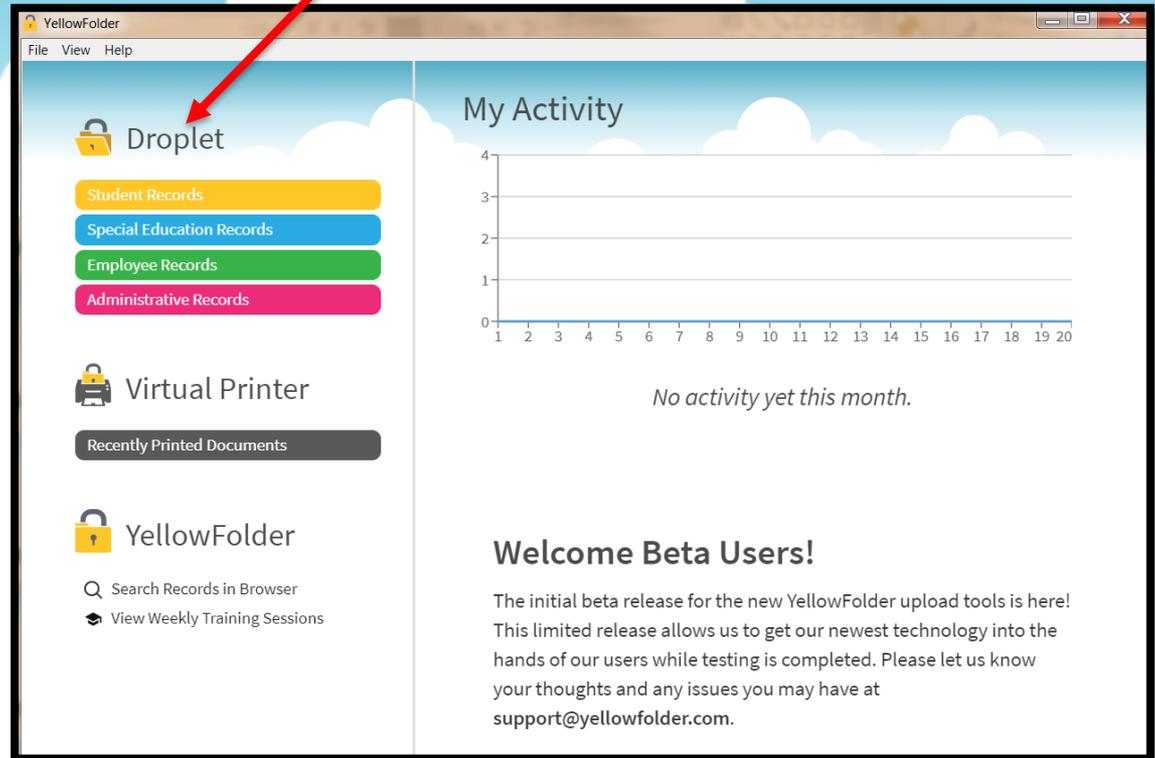
*Which do I use?*

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

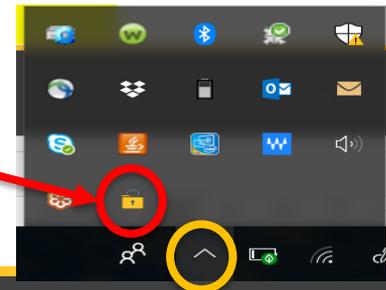
# Droplet - Uploading Documents



Watch a live demonstration in the YellowFolder system of how to use the Droplet tool



**HINT:** Once you log into the tools, the application will continue running in order to finish processing, especially Virtual Printer uploads. Due to a Windows issue, find the tools icon in the system tray to “re-store” the tool’s window.



# Droplet – Logging into the Tool



Let's Get Started

Login with your YellowFolder username and password to begin uploading documents.

koglesby.dms@yellowfolder.com

Password

Remember me

Forgot Password

Submit

HINT: The “Forgot Password” feature will aid in resetting the password if it is forgotten.

The user will click the “Submit” button after typing in the username and password.

# Droplet – Current Tool



Click “Help”, then click “Check for Updates” to ensure you have the most current Droplet and Virtual Printer – Tool Dashboard.



Let's Get Started

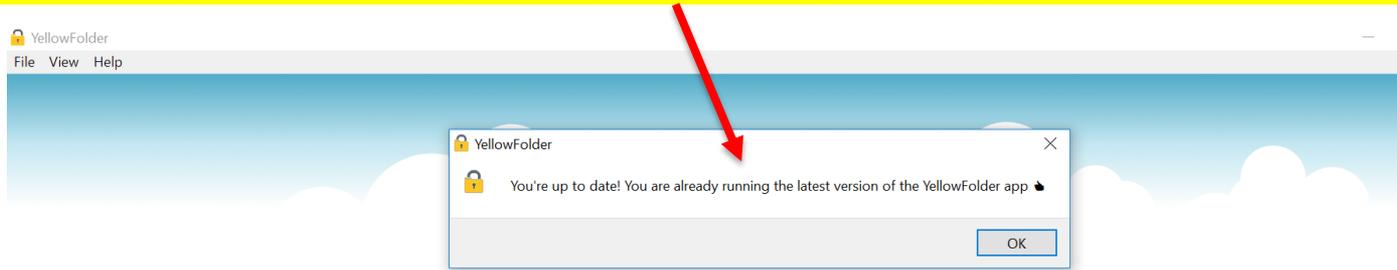
Login with your YellowFolder username and password to begin uploading documents.

Remember me [Forgot Password](#)

# Droplet – Current Tools, Cont.



A pop-up will appear to indicate whether you have the current version of tools. If not, you will be prompted to update your Tool Dashboard.



## Let's Get Started

Login with your YellowFolder username and password to begin uploading documents.

tt Tyler.dms@yellowfolder.com

Password

Remember me

[Forgot Password](#)

Submit

# Droplet – Welcome Screen



The upload tool home screen lets the user know how many batches of documents have been uploaded that month. Also, a greeting message keeps the user apprised of any updates or other messages from YellowFolder.

Logout

**Droplet**

- Student Records
- Special Education Records
- Employee Records
- Administrative Records

**Virtual Printer**

Recently Printed Documents

**YellowFolder**

- Search Records in Browser
- View Weekly Training Sessions

### My Activity

Day	Activity
1	0
2	0
3	0
4	0
5	0
6	0
7	0
8	0
9	0
10	0
11	0
12	0
13	0
14	0
15	0
16	0
17	0
18	0
19	0
20	4
21	0

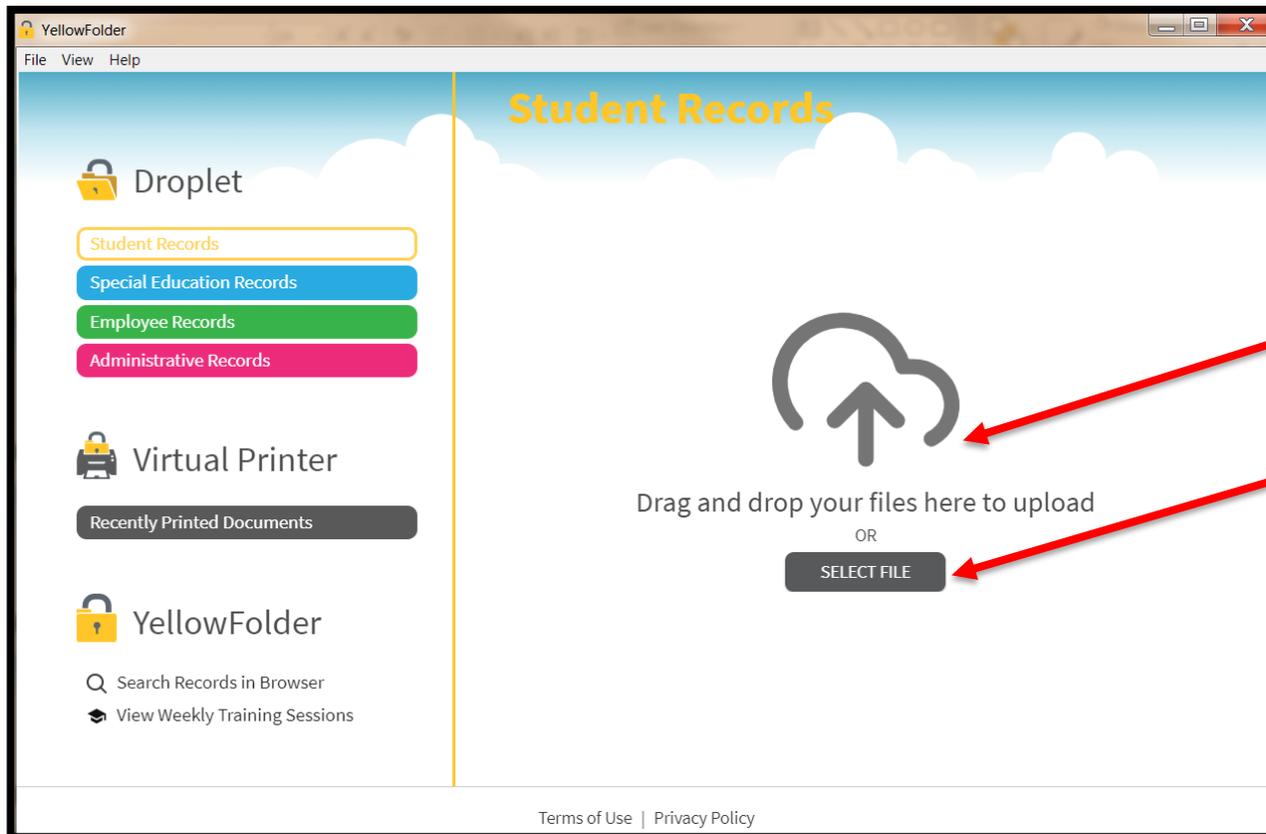
### Welcome Beta Users!

The initial beta release for the new YellowFolder upload tools is here! This limited release allows us to get our newest technology into the hands of our users while testing is completed. Please let us know your thoughts and any issues you may have at [support@yellowfolder.com](mailto:support@yellowfolder.com).

# Droplet – Uploading Documents

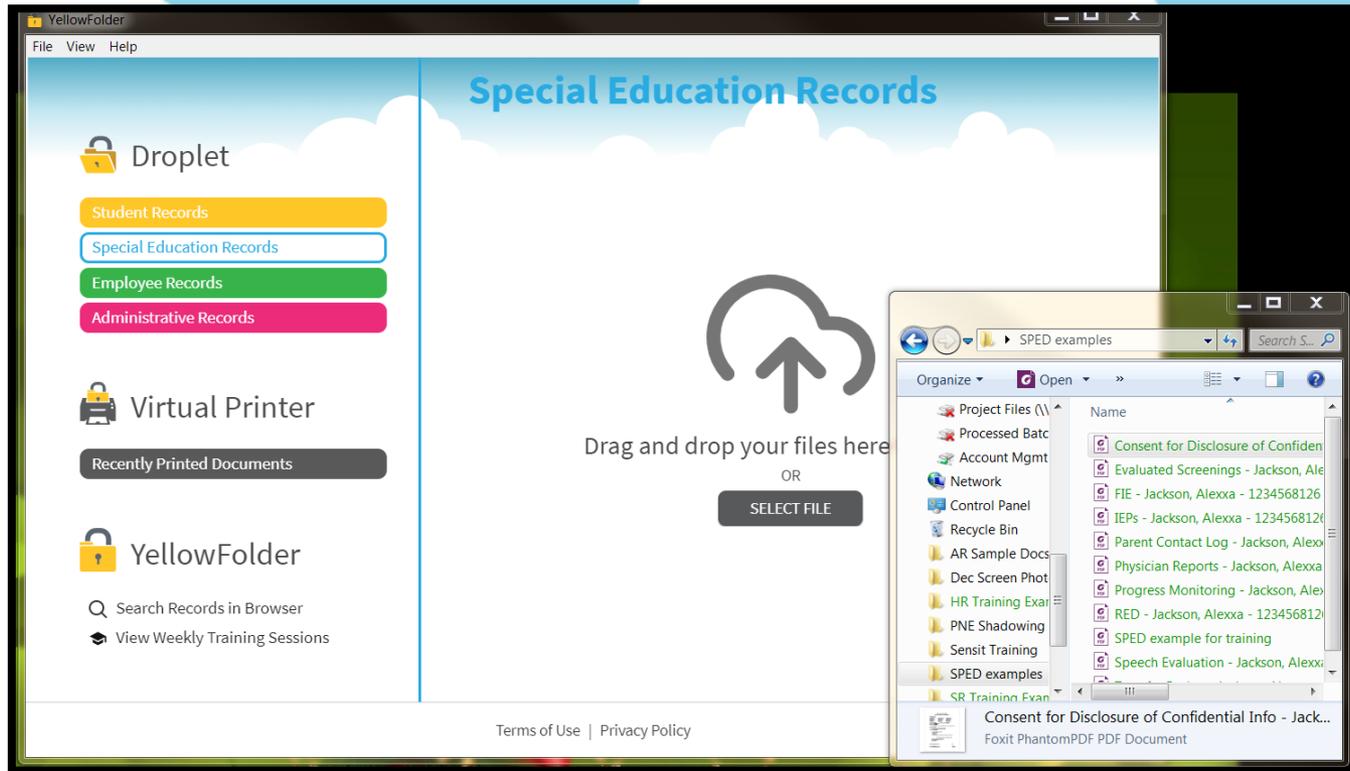


**Helpful Hint:** When scanning consider saving your documents on a flash/USB drive rather than emailing them to yourself for easier and faster uploading using the Droplet.



The Droplet tool allows the user to upload in different ways. The user can select the documents **OR** drag the documents across the desktop into the Droplet.

# Droplet – 2 Ways to Use It!



**Option #1:** The user can drag over one or multiple documents to upload.

**Option #2:** The user can click on the “Select File” button to pick one or multiple documents for uploading.

# Droplet – Uploading Single Person Documents



If all of the documents belong to one person, the user will pick the “Single Person” button to continue the loading process.

Batch Type



Single Person



Multiple Persons

- 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.

- 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.

Cancel Submit Batch

Select the “Submit Batch” button.

# Droplet – Uploading Multiple Persons Documents



YellowFolder

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.

Select the “Submit Batch” button.

Cancel Submit Batch

If the documents belong to multiple people, the user will pick the “Multiple Persons” button to continue the loading process.

# Droplet – Recent Upload List



YellowFolder

File View Help

## Special Education Records

Recent Uploads

New Upload

Filename	Date Uploaded		
RED - Jackson, Alexxa - 1234568126.pdf	12/20/2018 4:19 pm		
Physician Reports - Jackson, Alexxa - 12345...	12/20/2018 4:19 pm		
Progress Monitoring - Jackson, Alexxa - 123...	12/20/2018 4:19 pm		
	12/20/2018 4:18 pm		

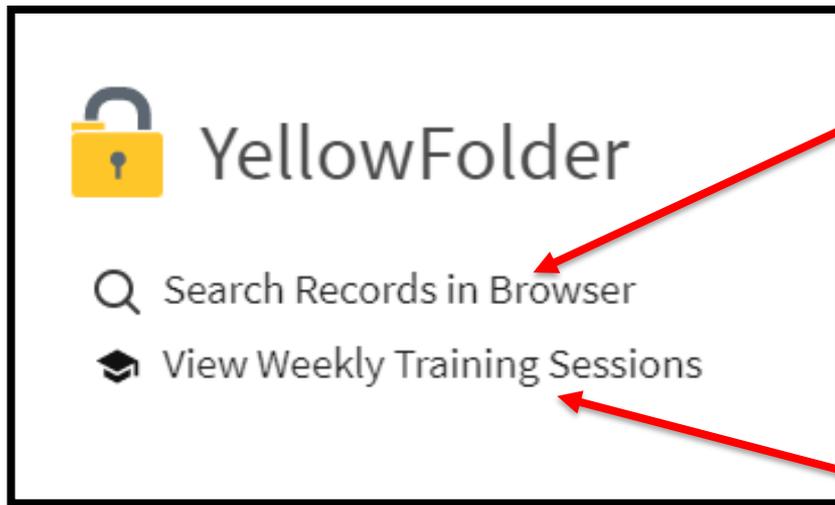
Terms of Use | Privacy Policy

The “New Upload” button will start the upload process again.

The user can select the eye icon to immediately view the document.

Selecting the download icon will provide the user with a copy of the document.

# Droplet – Extra Features



The “Search Records in Browser” feature allows the user to click and go online to the YellowFolder platform.

The weekly training sessions offered by the Paperless Nation Engineer team can be easily accessed within the Droplet tool.

# Uploading Documents



*Your turn to open Droplet on your computer and click on the record series to see how easy it is to drag a document or use the “Select” button to upload for one person or multiple persons. Do **NOT** recommend using Droplet unless you have actual documents to add to YellowFolder.*

# 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:

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