



YellowFolder

The Education Documentation Experts

Welcome to Tools Only 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

For today's training, we will focus on the Virtual Printer and Droplet tools. For additional training on the other tools, schedule sessions with me or attend weekly virtual trainings at www.yellowfolder.com and click on Trainings in the upper right corner.

Which do I use?

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

Virtual Printer

You already know how to print a document,
so you know how to use YellowFolder.

Virtual Printer – Logging into the Tool



YellowFolder

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

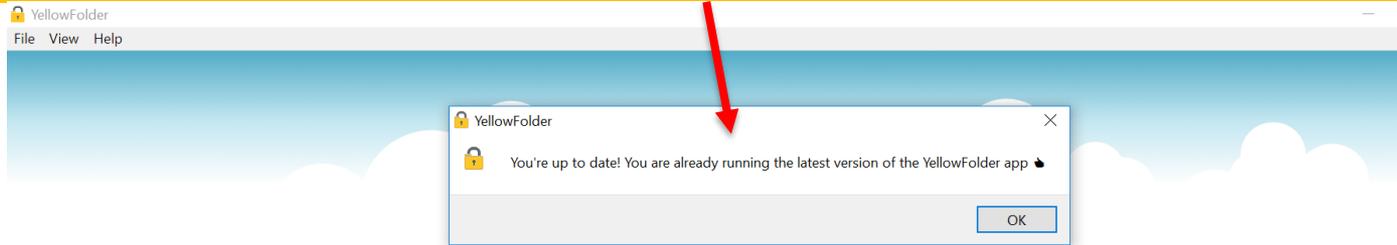
Login with your YellowFolder username and password to begin uploading documents.

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.

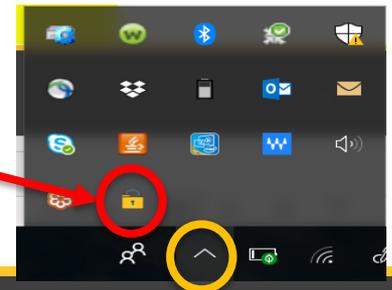
ttyler.dms@yellowfolder.com

Password

Remember me

[Forgot Password](#)

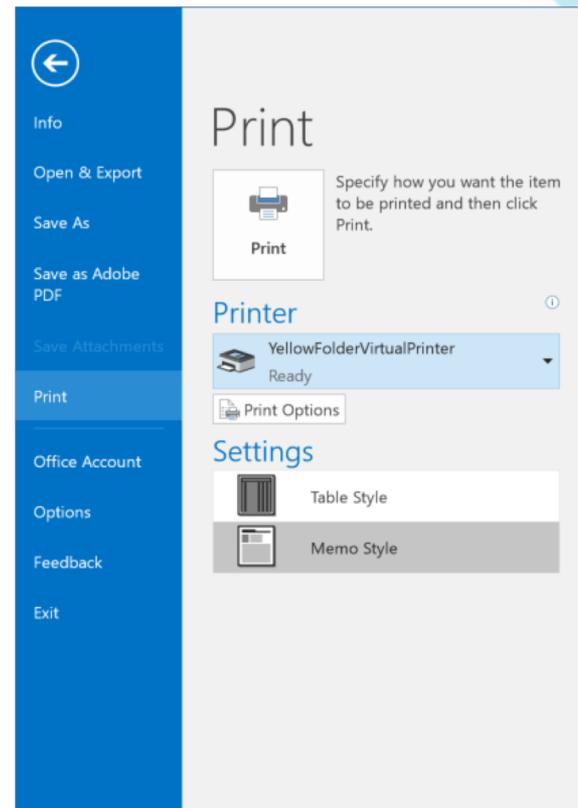
HINT: Once you log into the tools, the application will continue running in order to finish processing, especially Virtual Printer uploads. Due to a Windows issue, find the tools icon in the system tray to “re-store” the tool’s window.



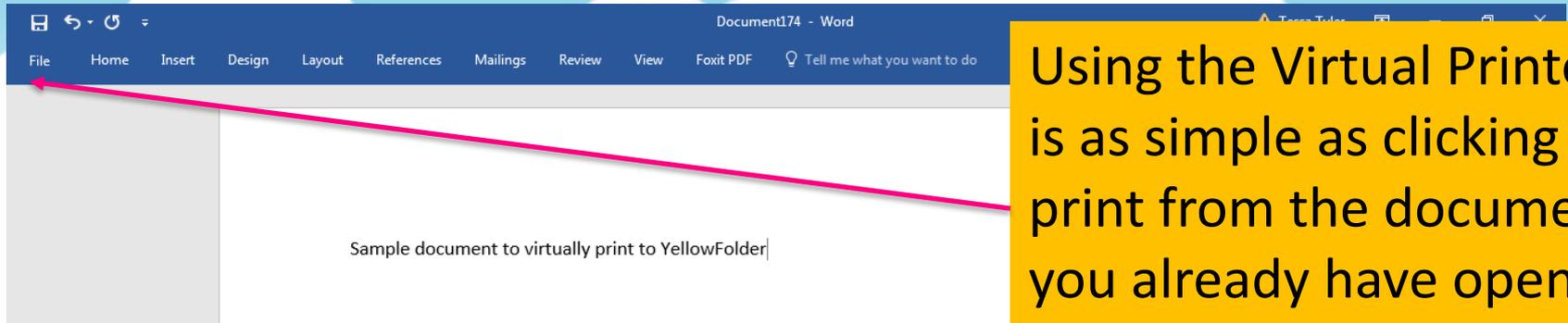
Virtual Printer - Uploading Documents



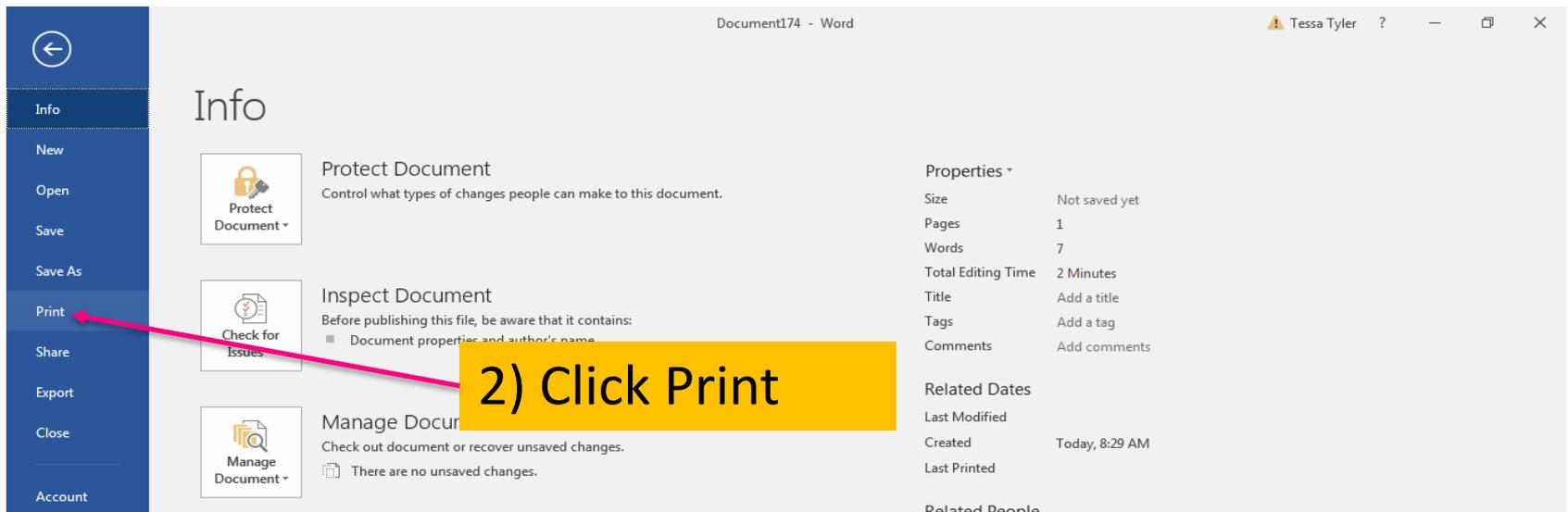
Watch a live demonstration in the YellowFolder system of how to use the Virtual Printer tool



Uploading Documents



Using the Virtual Printer is as simple as clicking print from the document you already have open.
1) Click File



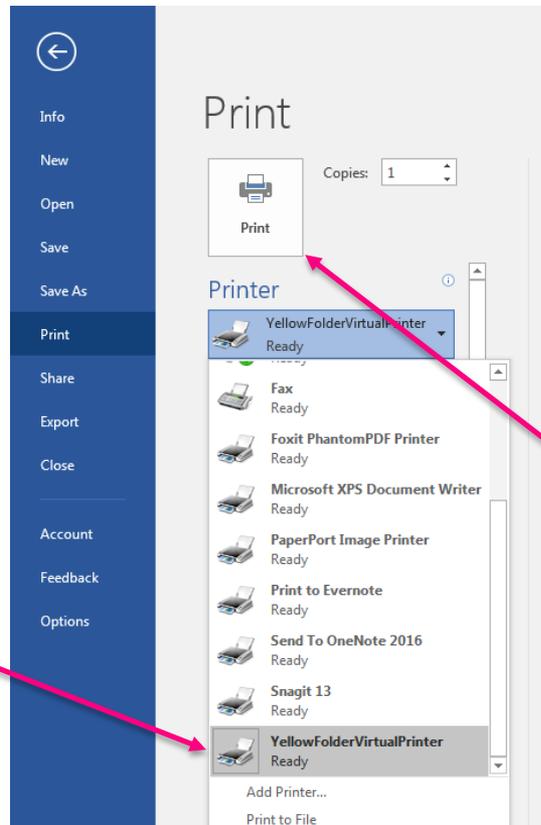
2) Click Print

Uploading Documents



Using the Virtual Printer

3) Choose YellowFolder VirtualPrinter from the printer drop down menu

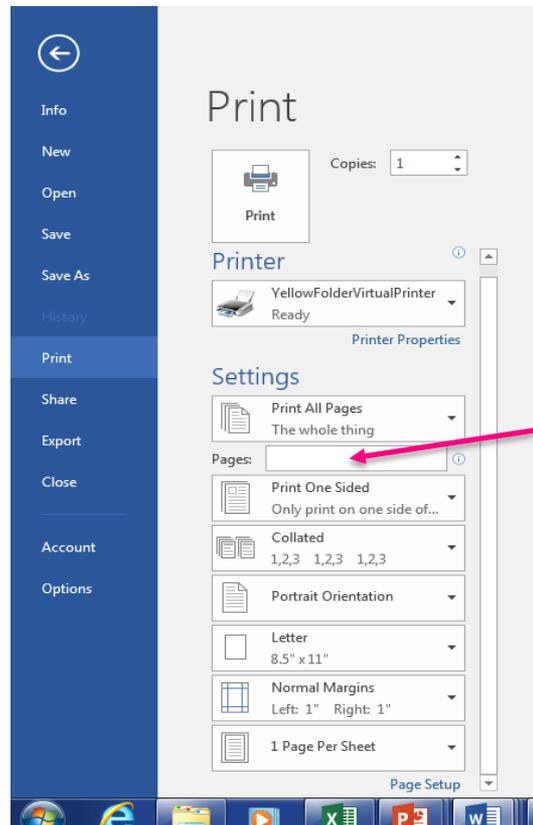


4) Click Print button

Uploading Documents



Print



* May select specific page ranges if not needing to upload an entire document or if needing to break up a document

Uploading Documents



Print

You can access a list of recently printed documents by clicking on the Recently Printed Documents tab from your Tool Dashboard.

The screenshot shows the YellowFolder web application interface. The browser window title is 'YellowFolder' and the menu includes 'File', 'View', and 'Help'. A 'Logout' link is in the top right. The main content area is divided into two columns. The left column contains navigation options: 'Droplet' with a sub-menu of 'Student Records', 'Special Education Records', 'Employee Records', and 'Administrative Records'; 'Virtual Printer' with a 'Recently Printed Documents' tab; and 'YellowFolder' with search and training session options. The right column features a 'My Activity' line graph showing activity levels over 20 days, a 'Welcome Beta Users!' announcement, and a 'Notifications' section for 'Version 3.2.32-beta'.

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

Uploading Documents



Print

YellowFolder
File View Help

Tool Dashboard Logout

Virtual Printer

Filename	Date Uploaded	View	Download
FSA-Enrollment-Form_HR 12222016_1.pdf	12/19/2018 8:44 am		
Certificate_HR 12222016_1.pdf	12/19/2018 8:44 am		
SummativeEvaluationForm_HR 12222016_1.pdf	12/19/2018 8:44 am		
Transcript_HR 12222016_1.pdf	12/19/2018 8:44 am		
Benefits application_HR 12222016_1.pdf	12/10/2018 10:43 am		
Certificate_HR 12222016_1.pdf	12/10/2018 10:43 am		
Benefits application_HR 12222016_1.pdf	12/10/2018 8:36 am		
Employment Application_HR 12222016_1.pdf	12/10/2018 8:36 am		
I-9_HR 12222016_1.pdf	12/10/2018 8:36 am		
FSA-Enrollment-Form_HR 12222016_1.pdf	12/10/2018 8:36 am		

« < 1 2 > »

Terms of Use | Privacy Policy

From the list, you are able to:

- View recently printed documents
- Download recently printed documents

Uploading Documents



Print

You can search documents in YellowFolder by clicking Search Records in Browser.

You can view and register for our weekly live training sessions by clicking View Weekly Training Sessions

The screenshot shows the YellowFolder web application interface. The main content area is titled 'Virtual Printer' and contains a table of documents. The table has columns for 'Filename', 'Date Uploaded', and icons for viewing and downloading. The documents listed are:

Filename	Date Uploaded	View	Download
FSA-Enrollment-Form_HR 12222016_1.pdf	12/19/2018 8:44 am		
Certificate_HR 12222016_1.pdf	12/19/2018 8:44 am		
SummativeEvaluationForm_HR 12222016_1.pdf	12/19/2018 8:44 am		
Transcript_HR 12222016_1.pdf	12/19/2018 8:44 am		
Benefits application_HR 12222016_1.pdf	12/10/2018 10:43 am		
Certificate_HR 12222016_1.pdf	12/10/2018 10:43 am		
Benefits application_HR 12222016_1.pdf	12/10/2018 8:36 am		
Employment Application_HR 12222016_1.pdf	12/10/2018 8:36 am		
I-9_HR 12222016_1.pdf	12/10/2018 8:36 am		
FSA-Enrollment-Form_HR 12222016_1.pdf	12/10/2018 8:36 am		

At the bottom of the table, there are navigation arrows: << < 1 2 > >>. Below the table, there are links for 'Terms of Use' and 'Privacy Policy'.

Uploading Documents



Your turn to use Virtual Printer. Simply open a document, go to print and view how easy it is to use Virtual Printer. Recommend **NOT** using this unless you have actual documents to upload into the system.

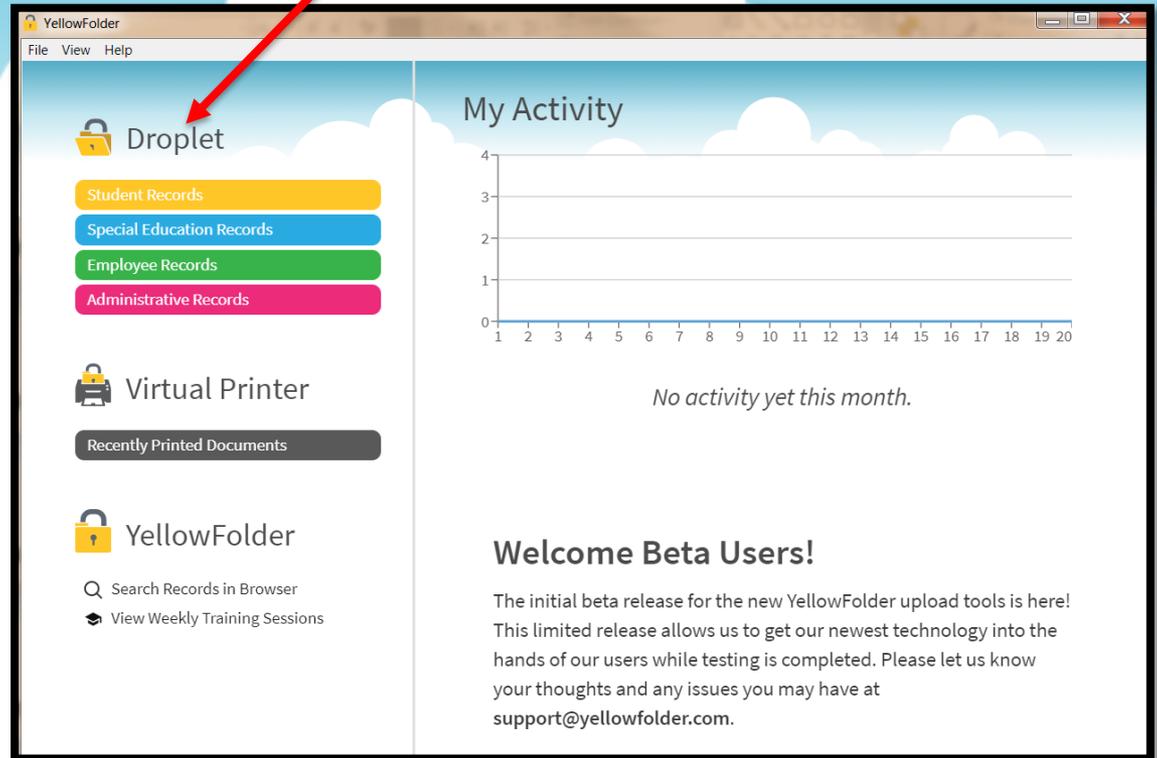
The Droplet

You have probably attached documents to an email and dragged and dropped documents into a folder on your computer, therefore you already know how to use YellowFolder.

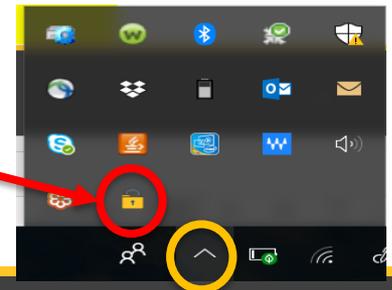
Droplet - Uploading Documents



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

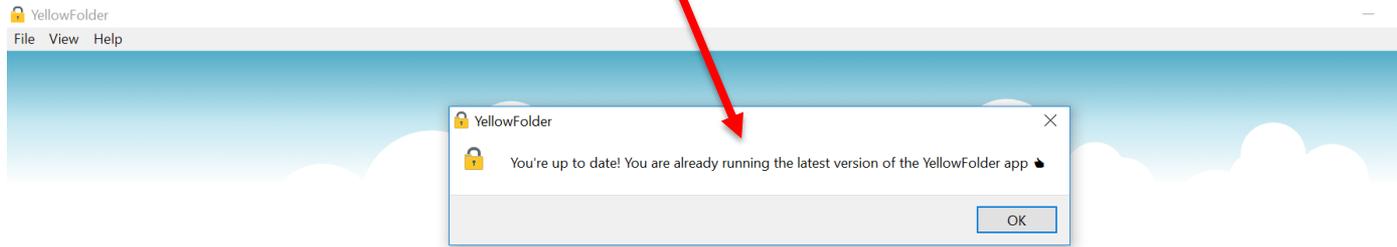
Login with your YellowFolder username and password to begin uploading documents.

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

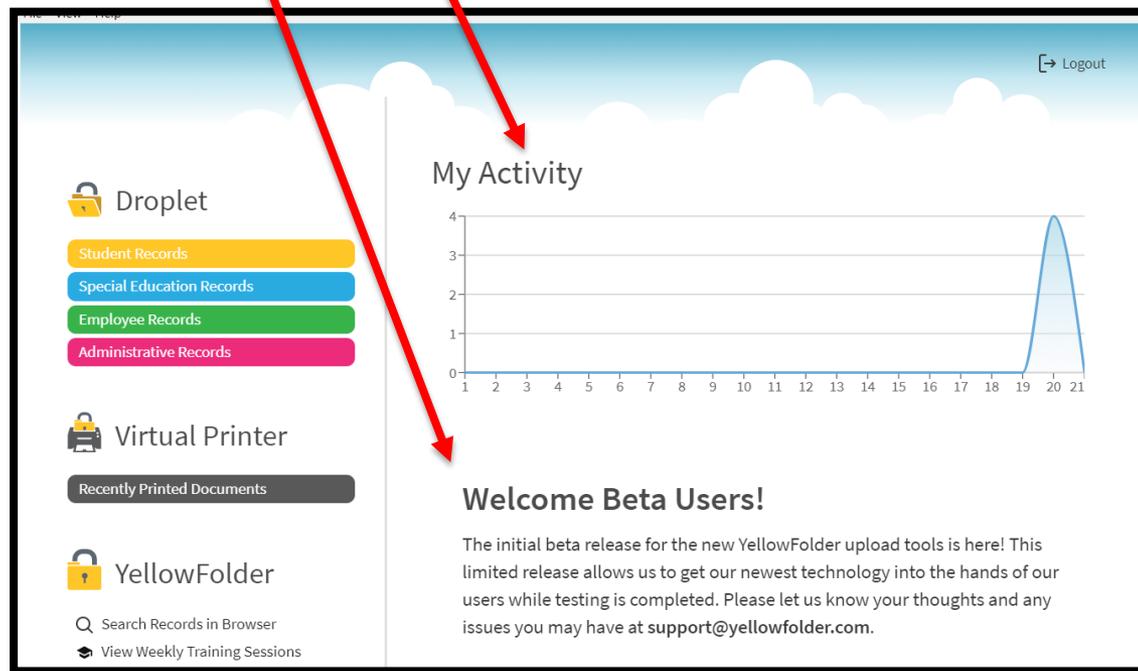
[Forgot Password](#)

Submit

Droplet – Welcome Screen



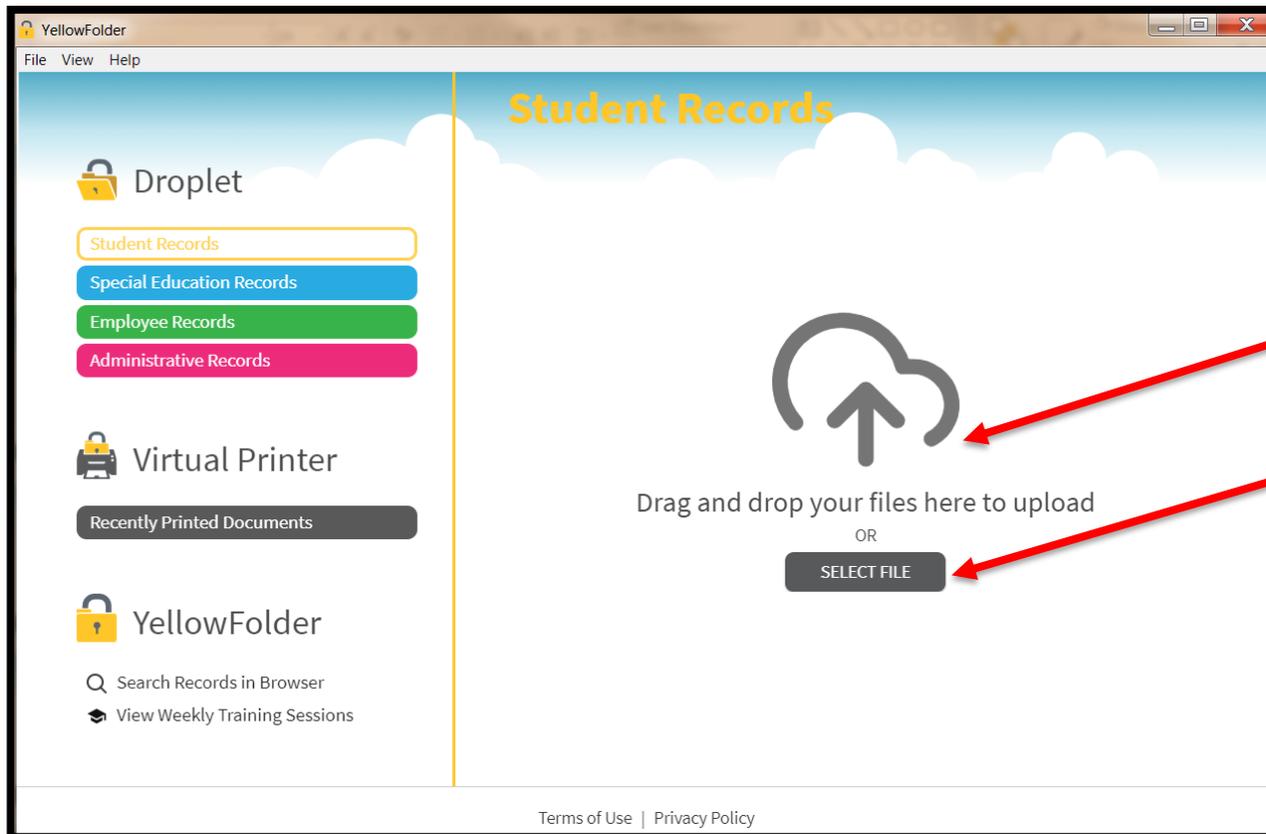
The upload tool home screen lets the user know how many batches of documents have been uploaded that month. Also, a greeting message keeps the user apprised of any updates or other messages from YellowFolder.



Droplet – Uploading Documents

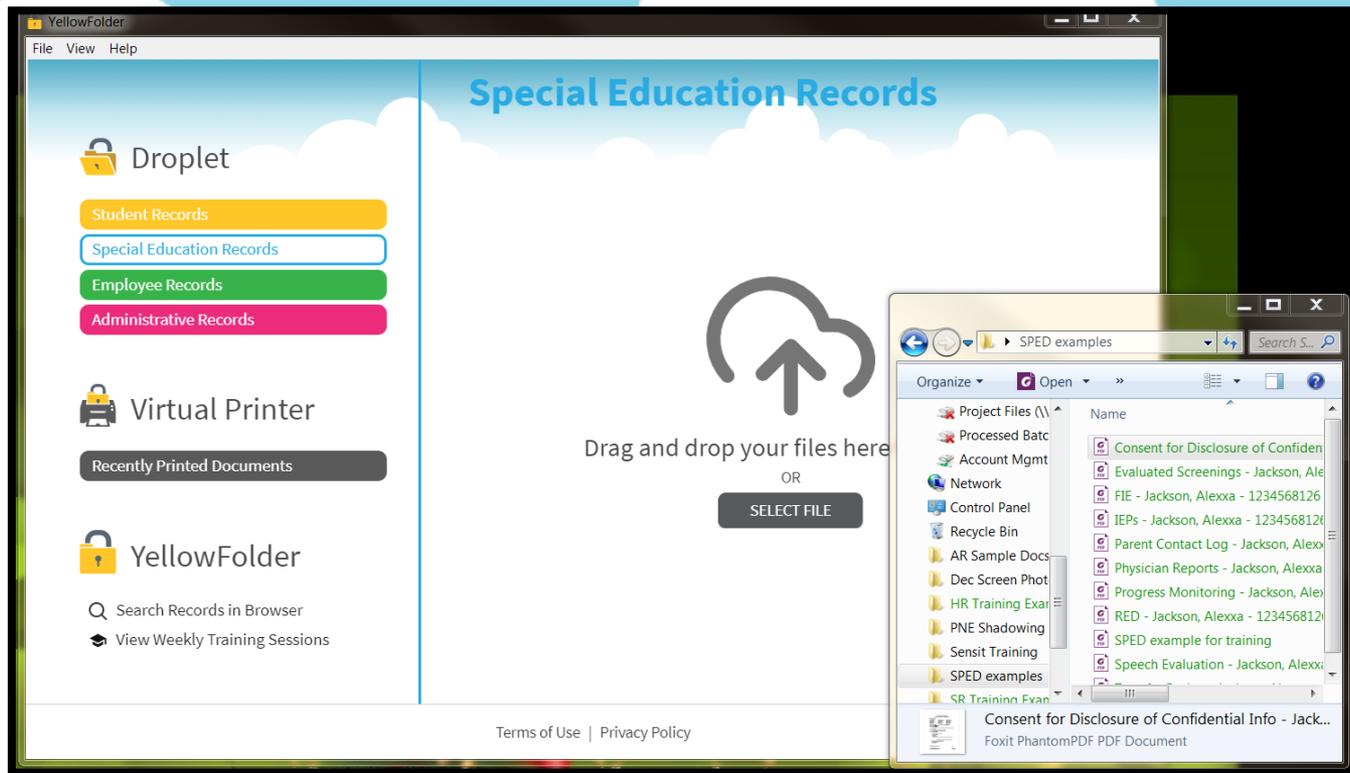


Helpful Hint: When scanning consider saving your documents on a flash/USB drive rather than emailing them to yourself for easier and faster uploading using the Droplet.



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



The screenshot shows the YellowFolder web application interface. On the left, there is a sidebar with a 'Droplet' section containing four colored buttons: 'Student Records' (yellow), 'Special Education Records' (blue), 'Employee Records' (green), and 'Administrative Records' (pink). Below this is a 'Virtual Printer' section with a printer icon and 'Recently Printed Documents'. At the bottom of the sidebar is the 'YellowFolder' logo and search options: 'Search Records in Browser' and 'View Weekly Training Sessions'. The main content area is titled 'Special Education Records' and features a 'Recent Uploads' table. The table has columns for 'Filename', 'Date Uploaded', and icons for viewing and downloading. A 'New Upload' button is located in the top right of the table area. Three yellow callout boxes with red arrows point to the 'New Upload' button, the eye icon, and the download icon.

Filename	Date Uploaded	View	Download
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	👁	📄

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

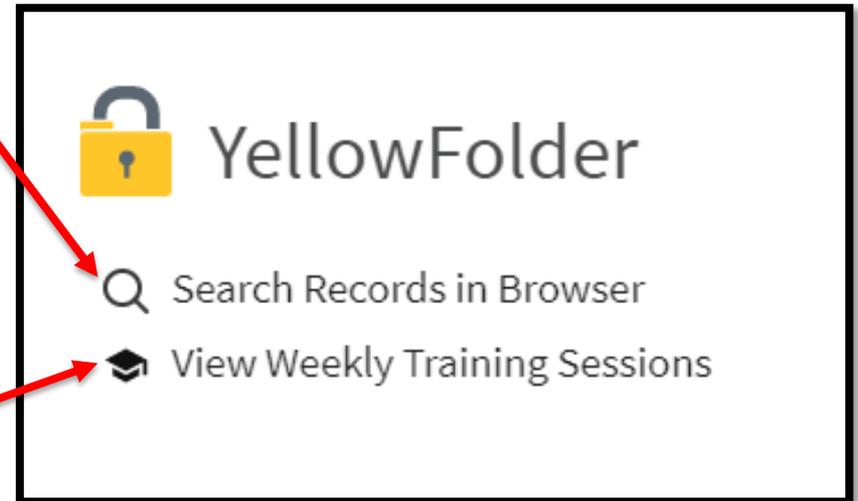
The user can select the eye icon to immediately view the document.

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 use Droplet on your computer. Open the Tool Dashboard, click on the record series and see how easy to use Droplet. Do **NOT** recommend using Droplet unless you have actual documents to add to YellowFolder.

Scan and Upload

You have probably scanned and attached documents, therefore you already know how to use YellowFolder.

Scan and Upload- Uploading Documents



Watch a live demonstration in the YellowFolder system of how to use the Scan and Upload tool

The screenshot displays the YellowFolder user interface. At the top left is the YellowFolder logo with the tagline 'The Education Documentation Experts'. To the right are navigation buttons for 'Download', 'Dashboard', 'Search Records', and 'Logout'. Below the navigation bar, the user is greeted with 'Hi, Sharon McClain (smcclain@yellowfolder.com)'. The main section is titled 'Scan & Upload' and contains the following elements:

- Account Name: PNEDemo02
- Record Series: Student Records (dropdown menu)
- A search input field with a dropdown arrow.
- A 'Scan' button.
- A file selection input showing 'Choose File' and 'No file chosen'.
- An 'Upload' button.
- A 'Sort Descending' dropdown menu.
- On the right side, the text 'PNEDemo02 - Student Records' is displayed above a 'Select All' checkbox and a 'Del' button.
- Below the main content area, there are two yellow buttons with double arrow symbols (» and «).

Scan and Upload - Uploading Documents



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

Choose File Uploads button to go to the dashboard

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](#)

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
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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

[^](#)

Scan and Upload - Uploading Documents



To begin uploading documents with the Scan & Upload click tab at the upper right corner of your dashboard.

**For the scanning feature, you will need a scanner connected to your individual computer, however you can still use the upload feature without a scanner.



Scan and Upload – Uploading Documents



Scan & Upload

Account Name: PNEDemo02

Record Series: Student Records

Scan Choose File No file chosen Upload

Sort Descending

PNEDemo02 - Student Records Select All Del

Incorporates two ways to upload:

- 1. A scanner attached directly to your computer.
- 2. An attachment from documents saved on your computer.

Upload Tool – Uploading Documents



- 1) Click Choose file to browse your files
- 2) When the window opens with your records, double click the document you want to upload
- 3) Click upload to send the document to the grey staging area on the right

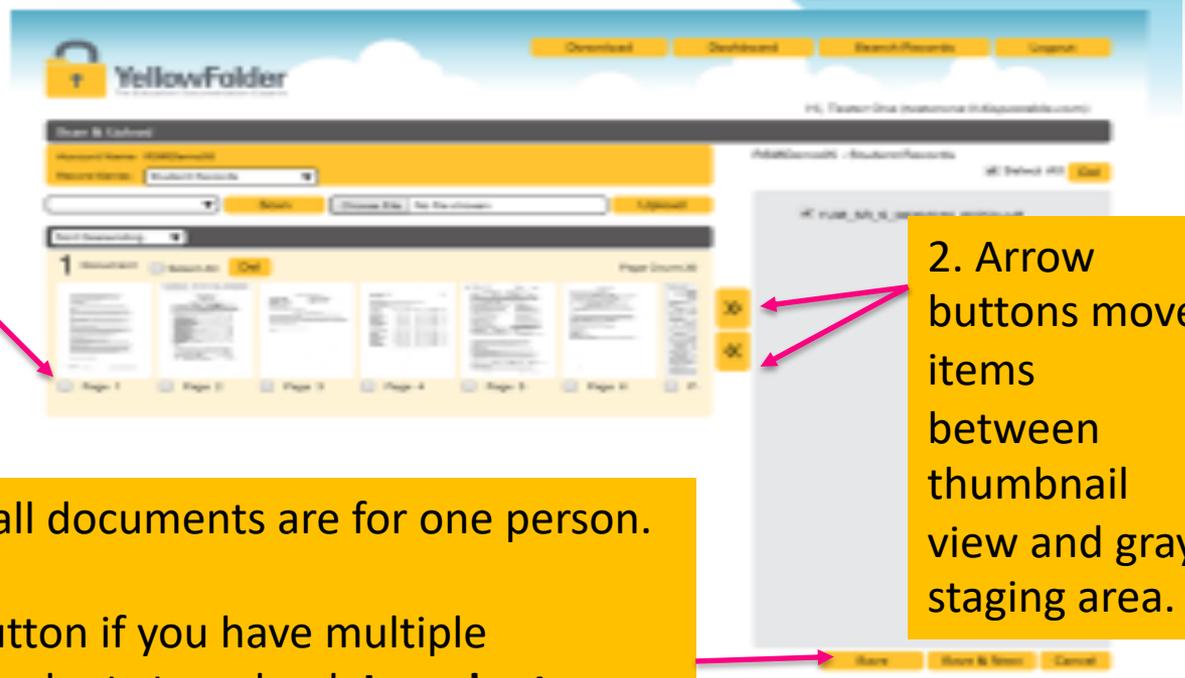
*Works like attaching a document to an email

Upload Tool - Uploading Documents



- Can manipulate files
- Can split large multi-student files

1. Click the boxes under the thumbnails to choose pages to send to gray staging area



2. Arrow buttons move items between thumbnail view and gray staging area.

3. Use the Save button if all documents are for one person.
or
3. Use the Save & Next button if you have multiple documents for multiple students to upload. **In order to use this feature, move only one document at a time in the gray staging area.**

Uploading Options to Split and Merge

Upload Options

If the document requires splitting or merging continue with the following additional steps:

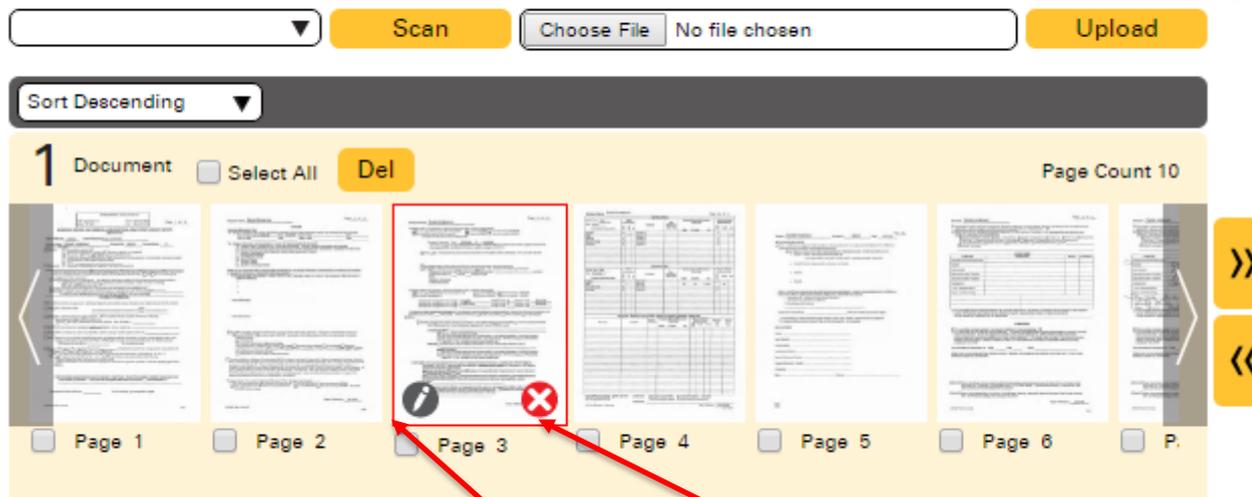
Option 1 – Splitting Documents

- A. To split the document, check box beside document in gray area and click left arrow to move document into viewer area.*
- B. Check the boxes under the thumbnail pictures to choose pages to split out of the original document, then click right arrow to send back to gray staging area as a new document.*
- C. Check box beside document in gray area and click Save (if documents are all for one person) or Save & Next (if documents are for different people) button to complete saving to YF. In order for this to use this feature, move only one document at a time in the gray staging area.*

Option 2 – Merging Documents

- A. To merge documents, must have uploaded at least two documents from your computer.*
- B. Check boxes beside all documents to be merged in gray area, then click left arrow to move documents into viewer area.*
- C. Click page to merge with another document and drag it to that document and drop where that page needs to be, then check the boxes under the thumbnail of pages that will be part of that document.*
- D. Click the right arrow to send the document to gray staging area as a new document.*
- E. Check box beside document in gray area and click Save (if documents are all for one person) or Save & Next (if documents are for different people) button to complete saving to YF. In order for this to use this feature, move only one document at a time in the gray staging area.*

Scan & Upload Tool – Uploading Documents



Hover a page with the mouse to highlight and produce a pencil and an "X" icon

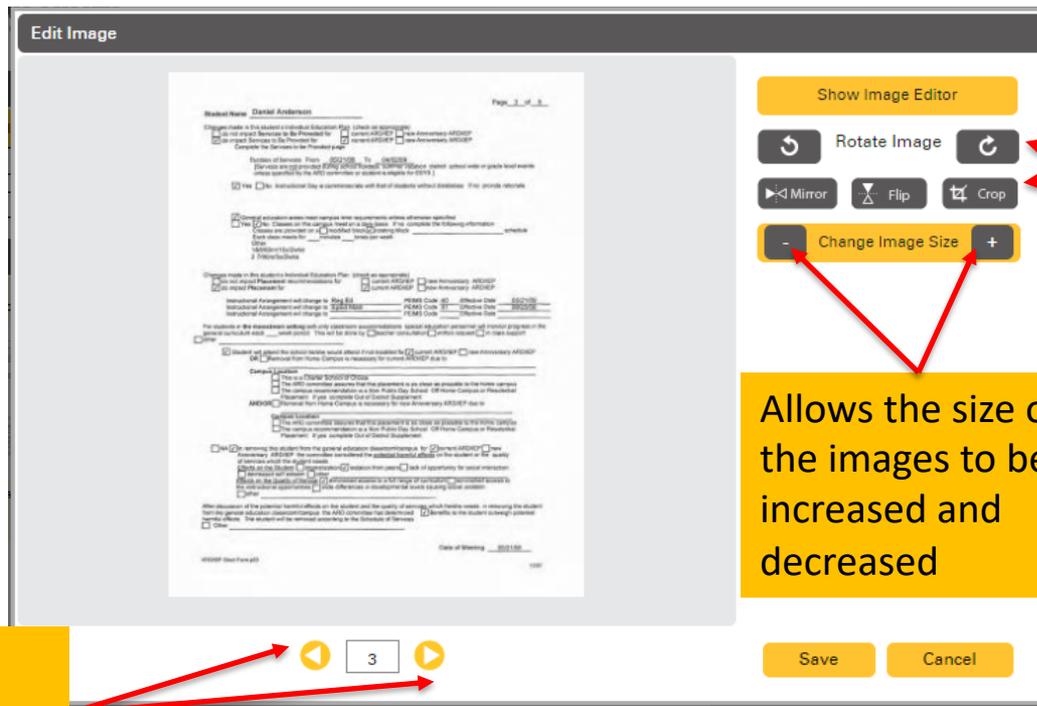
Clicking on the pencil, gives a screen where you can increase the size of the thumbnails for better viewing and easier manipulation

Clicking on the "X" icon will delete the page out of the document before uploading

Scan & Upload Tool – Uploading Documents



After clicking on the pencil icon, the image editor screen will pop up



Rotation and cropping tools

Allows the size of the images to be increased and decreased

Allows for scrolling through the pages inside the image editor

Dividing a Batch with Scan and Upload



- Ways to divide a large batch of document by individual student and/or staff information:
 1. Can use the Scan & Upload page to bring the document in and split manually. This can be time consuming.
 2. If document is of a set length (1 page only, 2 pages only, etc... where document can be evenly split into multiple documents), a PDF editor such as Adobe Acrobat Pro or Foxit can easily split document into separate files. Once in separate files, make sure the YellowFolder virtual printer is your default printer and highlight all the files, right-click on one and select Print. All batches will be automatically printed into separate batches and uploaded. Depending on the number of files, it could take awhile for this process to complete but the required time to accomplish would only be a couple minutes.
 3. Can use the YellowFolder Virtual Printer and use the page range field to manually split the document. This has to be repeated until each individual document inside the main document is split out and printed to YellowFolder Virtual Printer.

*Your turn to upload a document using Scan and Upload tool to see all the features available within this tool. Do **NOT** recommend you trying this feature unless you have documents ready to upload into the system.*

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- Enter Name
 - ▶ Enter phone number
 - ▶ xxxx@yellowfolder.com

- ▶ Address:

1617 W Crosby Road Suite 100

Carrollton, TX 75006